#### MARKETING COLLATERAL - 1991

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## What's Going On in the Processing Services Market?

Modest Growth.

Intense Competition.

- ▲ How big is it, and how will it grow over five years?
- ▲ How are new architectures and cheap MIPS affecting it?
- ▲ How are the big players diversifying?
- ▲ How interested should I be in disaster recovery services?
- ▲ Where will the new growth opportunities be?

#### How Do You Succeed? Read INPUT's New Report

When a market shows only modest growth, like the processing services market, the companies that succeed usually have something their competitors don't.

They have specific intelligence on what trends are shaping the market, where the market is going, and where the best opportunities are for companies that are alert and agile enough to exploit them.

#### Report Contents

#### General Business Climate

- General Economic Climate
- Information Services Industry Issues and Climate
- Processing Services Business Issues and Trends

#### Market Forecast

- Processing Services Overview
- Driving Forces
- Submode Market Forecasts

#### Issues and Trends

- Transaction Processing Services
- Utility Processing Services
- Other Processing Services

#### Competition

- Market Leaders
- Competitive Issues
- Segment Leaders
- Vendor Profiles

#### Conclusions and Recommendations

- Processing Services Overview
- Transaction Processing Services
- Utility Processing Services
- Other Processing Services

INPUT has just released a new report to give you this intelligence *now*, when changes in the market could very well dictate substantial changes in your product, marketing, and sales strategies.

Entitled *U.S. Processing Services Market*, 1990-1995, the report offers detailed five-year market projections by delivery mode and by vertical industry. It is a comprehensive analysis of a market offering considerable revenue and profit opportunities.

And if you act before May 7, 1991, you'll pay \$200 less than the regular list price for the report—a savings of 10 percent!

What's happening in processing services? Why has it offered several large companies dependable margins over the long haul? ANPUT's report answers these questions and more.

#### **Sweeping Trends**

The processing services market is in the grip of significant forces that are changing how the game is played. INPUT examines these forces, answering questions like:

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- How big is the market today, and how fast will it grow for the next five years?
- How will outsourcing affect market growth and your business in the future?
- What impacts will the recession have on the overall market for processing services?
- How can you best prepare for the downturn?
- What large-scale impacts will improvements in client/server architectures and dollars/MIPS ratios have on processing services?
- Which submarkets have the best promise for short-term growth? For sustained long-term growth?

INPUT's experts have watched the processing services market grow for decades. This report puts their combined expertise to work for you in analyzing these sweeping trends.

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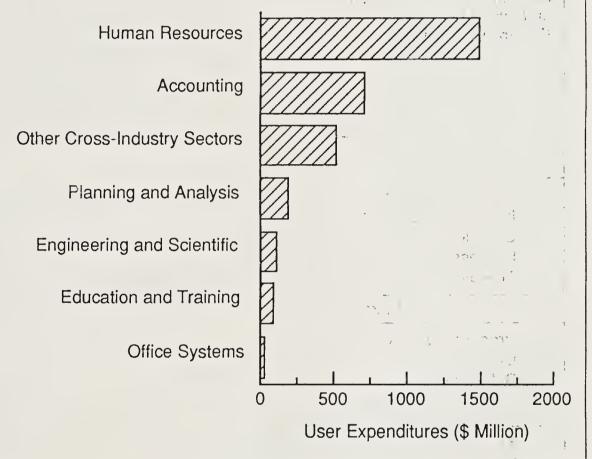
### INPUT

#### Ramifications

But that's not all. In addition, INPUT's report, U.S. Processing Services Market, 1990-1995 delves into the specific dynamics of much smaller changes whose ramifications could still have a tremendous impact on your business:

- Who are the leading processing services vendors, and what are they doing right?
- How important is systems operations to these vendors, measured in dollars?
- Who are the leading vendors in utility processing services?
   specialized niche markets?
- ...ow are large vendors offering their clients an expanding mix of service offerings?
- Who are the dominant competitors in disaster recovery services?
- What is the opportunity in this area?
- What are the long-term prospects for computer-output microfilm (COM) services?





WHERE DOES THE MONEY GO? The report tracks expenditures in several different ways, including yearly outlays by cross-industry sector.

And more on the specific questions you must answer to stay ahead of the curve in a market whose growth might be modest, but whose changes are likely to be significant in the short term.

The money is there to be made, but it takes excellent market intelligence to figure out how to invest your resources to get the highest possible return.

"INPUT's U.S. Processing Services Market, 1990-1995 gives you that market intelligence now, ahead of the curve, when it will have the greatest impact on yousiness.

Use the enclosed form to order your copy today!

Call, fax, or mail your order to any INPUT office listed on the back of this brochure



INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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If You Want to Get the Best Research and Expert Analysis of Today's Professional Services Markets...

- ▲ How will the recession affect your business?
- ▲ Which segments and delivery modes are growing fastest?
- ▲ How can you provide significant added value?
- Who are the major competitors in your market?
- ▲ What are the four greatest dangers facing your business?

## ... You Need the Newest Market Analysis Report from INPUT!

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Periods of rapid change offer alert professional services vendors tremendous revenue opportunities. And INPUT has just released a report designed to give you the hard facts and informed analysis you need to make these changes work for you. Entitled *U.S. Professional Services Market Analysis Report*, 1990-1995, it is INPUT's comprehensive five-year analysis of the professional services market.

U.S. Professional Services Market Analysis Report, 1990-1995

#### General Business Climate

- General Economic Climate
- Information Services Issues and Climate
- Professional Services Business Issues and Trends

#### Market Forecast

- Industry Structure
- Market Structure
- · Professional Services Market
- Forecast by Submode
- Current Market Situation
- Professional Services Component of Systems Integration
- Overlap with Data from INPUT's Customer Services Program

#### Issues and Trends

- Key Information Systems Trends for the 1990s
- Professional Services Market
  - Driving Forces
  - Growth Inhibitors

#### Competition

- Market Leaders
- Segment Leaders
- Mergers and Acquisitions
- Vendor Profiles

Conclusions and Recommendations

It offers the perceptive professional services marketer a host of competitive advantages, including information *now* on the hottest business and technical trends in the industry.

And if you act before April 4, 1991, you'll pay \$300 less than the regular list price for the report—a savings of 10 percent!

This report is the latest in a series of highly respected research studies INPUT prepares on the professional services market. How professional services will be affected by the general business climate, how big the markets are, what forces are driving their growth, what forces might threaten the market, who the leading competitors are, and incisive conclusions and recommendations for future strategies—*U.S. Professional Services Market Analysis Report*, 1990-1995, covers all of this, and more.

#### The Answers You Need

Major forces are at work transforming the market you have to compete in every day. INPUT analyzes those large-scale trends, spotting the opportunities for revenue growth, long-term contracts, and competitive advantage. The report addresses questions like:

- What forces are driving market growth?
- Where are the largest future opportunities, and how can you shape your business to exploit them?
- How are buyers evaluating vendors and their professional services offerings?
- How important are value-added capabilities in today's competitive environment?
- How can you capture some of the integration business resulting from the wave of mergers and acquisitions during the late 1980s?
- How can you deal with chronic shortages of people with the right technical skills?

- Who are the major competitors in software development? In consulting? In education and training?
- What strategies are these market leaders pursuing? What is their history in the market? What are their key products and services?
- What are the four greatest dangers facing , professional services vendors today?
- What are the five greatest opportunities?

And a host of other questions that every successful professional services vendor simply has to answer.

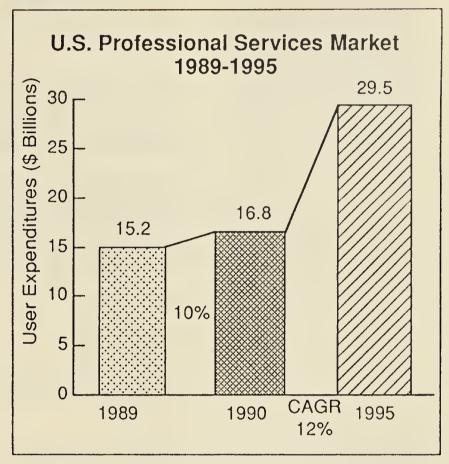
#### Guidance

In addition, the report addresses tactical issues and niche-market opportunities that can lead your company to big payoffs in today's fluid market:

- What four capabilities do users employ to differentiate between "plain vanilla" professional services firms and vendors with unique skills?
- Where are the heaviest professional services expenditures in discrete manufacturing?
- How can you best exploit the opportunities for software consulting to state and local governments?
- How does the federal government's quest to upgrade second-generation computer systems offer professional services opportunities?
- Why are banks and other financial institutions using more professional services firms these days?
- What professional services do process manufacturing companies need most, and why?
- Does the new generation of application development tools constitute a near-term threat to professional services vendors?

The report addresses all of these, plus questions about which business functions account for the most professional services expenditures, what role does networking play in the market today, what does the downsizing of the typical platform mean for your business, and others that can help you shape your business to meet the changing demands of the 1990s.

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INPUT's PROJECTION of the professional services sector is for steady growth at a rate slower than that of the overall information systems industry

You can put all of this research—and the expert analysis of consultants with decades of experience in this market—on your business team. All you have to do is use the enclosed order form to order your copy of *U.S. Professional Services Market Analysis Report*, 1990-1995, today.

Call, fax, or mail your order to any INPUT office listed on the back of this brochure



INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

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When You Need Answers to the Key Questions about the Applications Software Products and Turnkey Systems Markets...

- ▲ How fast will they grow, and why?
- What strategies are the leading vendors pursuing?
- ▲ How will the recession affect system development?
- ▲ How big will various market segments be five years out?
- ▲ What technologies will change your market position?

## ...You Need the Research and Analysis in INPUT's New Report!



You need targeted market intelligence on large-scale trends and tactical opportunities in applications software products and turnkey systems. And INPUT has just published a report, entitled *U.S. Application Solutions Market*, 1990-1995, that is designed to give you that intelligence now, when it can offer you the greatest possible competitive advantage.

#### U.S. Applications Solutions Market, 1990-1995

#### General Business Climate

- General Economic Climate
- Information Services Industry Issues and Climate
- Application Solutions Business Issues and Trends

#### Market Forecast

- Market Overview
- Driving Forces
- Forecast by Platform Size and Submode
- Industry and Cross-Industry Sector Forecasts

#### Issues and Trends

- Shifting Technology Foundations
- Changing Buying Patterns
- Price Investment Pressure
- Changing Distribution Channels
- Importance of Value-Added Services
- Market Specialization
- Future Issues and Trends

#### Competition

- Competitive Strategies
- Shifting Market Structure
- Vendor Profiles

Conclusions and Recommendations

The markets for applications solutions are changing rapidly. Market forces, technological developments, and competitive trends are all acting together—sometimes in contradictory ways—to transform the way companies decide to acquire solutions of all kinds.

INPUT's report gives you an in-depth examination of all these changes, allowing you to make informed decisions about where you should concentrate your technical, marketing, and sales resources. And for a limited time, we are offering *U.S. Application Solutions Market*, 1990-1995 to you at a considerable savings.

If you order before March 8, 1991, you'll pay \$300 less than the regular list price for the report—10 percent off!

INPUT's experts have decades of experience as both buyers and vendors of applications solutions. They have watched the market grow, mature, fragment, consolidate, and continue to change. Nothing throws them. And they have put this expertise to wo you in a report that can answer all of your queens about a very complex field.

#### Large-Scale Trends

The report offers primary research and informed analysis of both large trends and more localized trends in these markets. The broader questions it addresses include:

- What two contrary effects will economic uncertainty have on applications solutions market growth?
- How fast will these markets grow—by platform size (mainframe, minicomputer, workstation/PC) and submode (equipment, applications software products, systems software, professional services)?
- How will the drive toward standardization affect the market in the short term? In the long term?
- What are the slowest growing industry-specific markets? The fastest?
- Which cross-industry market is growing fastest?
- What role will alliances play in today's complex markets?

# Applications Software Products and Turnkey Systems User Expenditures, 1990-1995 Applications Software Products Turnkey Systems User Expenditures (\$ Billions)

INPUT'S PROJECTION for these two markets reflects the strength of applications software products versus turnkey systems.

- Which kinds of systems are targeted for accelerated development in a recessionary economy? Which are targeted for cancellation?
  - Now has the shift from mainframes to minis to PC/workstations affected this market?
- What impact will the move toward client/server architectures, LANs, and open systems have on these markets?
- What kind of growth opportunities will they offer?

And more on the major changes that are affecting vendors who want to provide focused, cost-effective solutions to their customers.

#### **Tactical Advantage**

The report also gives you a tactical advantage by answering more narrowly defined questions:

- What changes in buying patterns are favoring application solution vendors?
- What changes are working against them?
- How are users' desires for solutions rather than products transforming the market?
- How will the various distribution channels be affected by customers' desires for a single point of contact and comprehensive integration services?

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- Who are the leading vendors, and what did they do to achieve prominence?
- How are leading vendors' competitive strategies changing?
- Where are the incremental opportunities offered by economic uncertainty?
- How have pressures for CASE tools, graphical user interfaces, RDBMSs, and standards slowed the market?
- Which are the fastest growing industry-specific market sectors for applications software products and turnkey systems?
- Which are the fastest growing cross-industry market sectors?
- How can you compete in a market characterized by open systems and portability?

Plus a full set of conclusions and recommendations about the changing nature of the marketplace and how you can best deploy your resources to take advantage of new opportunities.

*U.S Application Solution Market*, 1990-1995 distills comprehensive research and decades of experience into a strategic tool you can use to help you gain competitive advantage in this complex market.

And all you have to do to get this advantage is use the enclosed order form to get your copy of *U.S.*Application Solutions Market, 1990-1995 today.

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Now, available for the first time in a single report—

## U.S. **Information Services Forecast** Compendium

1991-1996

-INPUT Forecasts of the U.S. Information **Services Industry** 

- Get the complete picture of the U.S. information services market
- Assess where the opportunities lie for your products and services
  - Obtain the data you need at a reasonable price

#### Look to INPUT's U.S. Information Services Forecast Compendium, 1991-1996 for...

...rcalistic market sizing information and growth rate data—keys to your planning and marketing strategies for the 1990s—and market research and consulting for your limited budget.

Are you prepared to deal with today's IS markets—much different than even a few short years ago? Market growth rates have slowed to the 10% range compared to the 20% to 25% growth rates of the 1980s. And the fast paced movement towards outsourcing, open systems, and downsizing creates risks as well as opportunities. Gain a clear understanding of the changes underway with reliable forecast and trend analysis data from INPUT's expert research.

This new report provides a complete picture of the U.S. information services market including:

- Forecasts for all major IS product and service categories
- Industry and cross-industry sector forecasts

Miscellaneous

- · Driving forces and forecast assumptions
- · Leading vendors and market shares
- Key competitive elements

Examine detailed forecasts for eight information services categories:

- Processing Services
- Turnkey Systems
- Applications Software Products
- Systems Operations
- Systems Integration
- Professional Services
- Network Services
- Systems Software Products

These categories are further forecasted by subcategory or submode. For example, the submodes within applications software products are mainframe-, minicomputer-, and workstation/personal computer-based applications software products. The systems integration submodes are equipment, software products, professional services, and other services.

User expenditures for each of the eight information service categories are also forecasted by major industry sector and crossindustry sector.

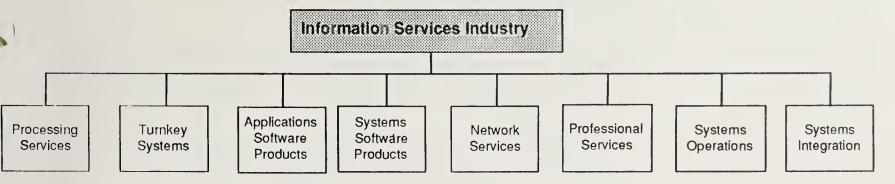
#### Network Services User Expenditure Forecast by Market Sector, 1990-1996 (\$ Millions)

|                           | <del>,</del>   |                        |              | ·——          | ,            |                      |
|---------------------------|----------------|------------------------|--------------|--------------|--------------|----------------------|
| Market Sectors            | 1990<br>(\$)   | Growth<br>90-91<br>(%) | 1991<br>(\$) | 1992<br>(\$) | 1996<br>(\$) | CAGR<br>91-96<br>(%) |
| Delivery Mode Total       | 8,089          | 16                     | 9,350        | 10,782       | 77           |                      |
| Vertical Industry Markets | 4,955          | 14                     | 5,627        | 6,649        | 7            |                      |
| Discrete Manufacturing    | 69             | 25                     | 86           | 109          |              |                      |
| Process Manufacturing     | 696            | 19                     | 825          | A 97         |              |                      |
| Transportation            | 270            | 11                     | 300          | Y\1          |              |                      |
| Utilities                 | 26             | 8                      | 28           | ٧            |              |                      |
| Telecommunications        | 93             | 18                     | 1/           |              |              |                      |
| Retail Distribution       | 155            | 21                     | / /          |              |              |                      |
| Wholesale Distribution    | 221            | 24                     | /            |              |              |                      |
| Banking and Finance       | 740            | 15                     | <i>y</i>     |              |              |                      |
| Insurance                 | 208            | <i> </i>               |              |              |              |                      |
| Health Services           | 446            | /                      |              |              |              |                      |
| Education                 | 163            |                        |              |              |              |                      |
| Business Services         | <b>/</b> \$48/ | ,                      |              |              |              |                      |
| Federal Government        |                |                        |              |              |              |                      |
| State and Local Gov't     | ·              |                        |              |              |              |                      |
|                           |                |                        |              |              |              |                      |

#### 15 Industry Sectors

- Banking and Finance
- Discrete Manufacturing
- Process Manufacturing
- Insurance
- Transportation
- Medical
- Utilities
- Education
- Telecommunications
- Federal Government
- State and Local Government
- Retail Distribution
- Wholesale Distribution
- Business Services
- Miscellaneous Industries

#### Information Services Industry Structure—1991-1996



#### 7 Cross-Industry Sectors

- Accounting
- Human Resources
- Office Systems
- Education and Training
- Planning and Analysis
- Engineering and Scientific
- Other Cross-Industry Sectors

All market forecasts and assumptions are clearly explained and include demand- and supply-side considerations, both internal and external to the industry, that either inhibit or promote user propensity to buy. Economic assumptions are provided.

In addition, the *U.S. Information Services* Forecast Compendium, 1991-1996 includes revenue estimates for leading vendors within each IS product/service category. Competitive characteristics or industry structural changes under way are summarized.

This report is the summary of a year of INPUT research, all rolled into one report. If you are going to buy just one report this year, this is the report to buy. Let INPUT help you accurately define and size your targeted markets.

TO ORDER: Mail or fax the enclosed order form or CALL (415) 961-3300.

#### Western Europe

The Western European Market for Software and Services. 1991-1996 report is also available. INPUT analyzes the Western European information services industry by major product/service category, major industry sector and also by country. The IS market within each country is discussed in terms of economic environment, IS trends and issues, and the competitive environment:

- France
- Germany
- United Kingdom
- Italy
- Sweden
- Denmark
- Norway

- Finland
- Netherlands
- Belgium
- Switzerland
- Austria
- Spain
- Rest of Europe

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Chances Are, CASE Will Have a Big Impact on Your Future . . .

Let INPUT Prepare You for It.

#### The Future of CASE, 1991-1996

Report Highlights

- · CASE in the IS context
  - Stages of CASE integration
    - · CASE market forecast
      - The competitive environment and AD/Cycle
        - Leading vendor strategies

## Read INPUT's New Report Today, and See How CASE Will Affect Your Business Tomorrow

INPUT's new report, *The Future of CASE*, 1991-1996, gives you the information you need to make the right decisions about CASE.

#### A Slow Beginning. A Promising Future?

Since the mid-1980s, CASE has held out the promise of making significant impact on the applications development process, and has the potential to make a far-reaching impact on the information services industry as a whole.

Even now, it's no secret that the promise for CASE is still largely in the future, but that future may be closer than you think. CASE is going through big changes, and over the next five years, it has the potential to change your business significantly—whether you're a user, a software vendor, or a professional services or systems integration firm.

INPUT's comprehensive report, *The Future of CASE*, 1991-1996 gives you a complete explanation of the issues that currently affect the CASE market and your place in it. Don't miss out on this glimpse of your future.

#### IS Departments' Requirements and Plans—Making the Case for CASE

INPUT's comprehensive research—which included written questionnaires from 92 CIOs, telephone interviews with 34 senior IS executives and CASE planners, and in-depth meetings with senior staff of over 20 CASE vendors—revealed important insights on CASE implementation issues that can help you focus your CASE efforts. The report answers questions such as:

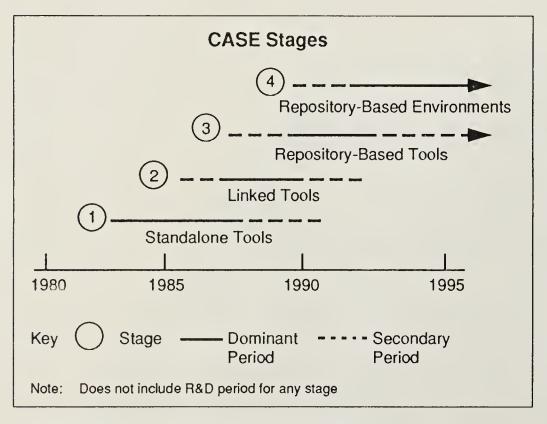
- How effective has CASE been in corporations?
- What is the current and planned use for CASE?
- What CASE products will be most favored in the future?
- More broadly, what changes are occurring in the nature of applications development?

One of the most interesting—and useful—results of the research is a series of "snapshots" contrasting the importance CASE users and vendors place on particular issues and how much knowledge of understanding of these issues each side now has. Such issues include:

- Reasons for CASE success and failure
- The impact of CASE on end users
- Re-engineering
- The impact of CASE on professional services and systems integration vendors

Three-quarters of the companies interviewed reported some CASE use. But CASE still has not shown significant results. INPUT's report analyzes the reasons for this in depth:

- What are the most serious barriers to wider CASE use?
- How important are the "soft" (e.g., cultural, organizational, and planning) issues?
- How has the lack of CASE tool integration affected wider CASE use?



INPUT has divided CASE development into four stages. A complete explanation of these stages provides an in-depth history of CASE and a full assessment of where CASE is going—so you can plan your CASE strategy with confidence.



#### CASE Forecast—Scenarios for F'ture Growth

Because CASE is relatively immature, it is subject to many variables. As a result, INPUT has prepared a market forecast to reflect alternate scenarios, providing a series of analyses on individual components of CASE growth. These serve as checkpoints against which you can measure your own development. INPUT's report answers questions such as:

- What market and technical factors affect CASE in both the near term and medium term?
- How will organizational readiness issues affect CASE implementations?
- By 1996, where will the greatest need and opportunity be in the CASE products market?
- How will developments in reengineering techniques affect growth?

The report addresses several additional issues that will help you fine-tune your CASE strategy for success.

#### Are You Prepared for the It Generation of CASE?

INPUT's analysis has identified four stages in CASE development, which started in the mid-1980s with standalone tools. Currently, CASE is in Stage 3, repository-based tools. Within this four-stage context, all CASE participants will have to deal with such issues as:

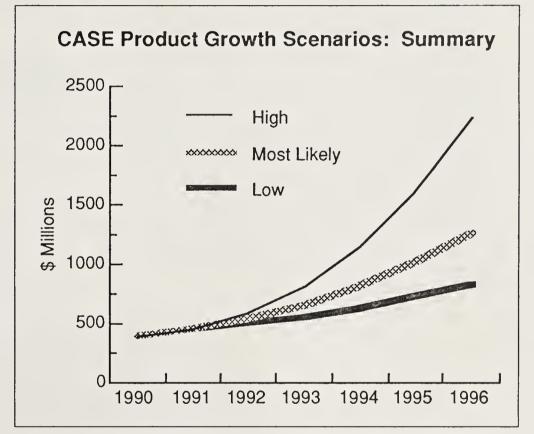
- What effect will AD/Cycle have on vendors other than IBM, and how can they compete with AD/Cycle? What role will partnerships play in this competition?
- What should be done now to prepare for a re-engineering environment?
- How is the focus of computing and application development likely to change in the next five years? How does your firm compare?
- What options do professional services and systems integration firms have in responding to CASE developments?

The sture of CASE, 1991-1996, provides the most ded, comprehensive assessment available of business-related CASE and its implications for your

enterprise—whether you're an information services vendor or are responsible for making CASE effective within an enterprise.

This report not only gives you analysis of some of the most pressing issues affecting the CASE market today, but also gives you the background necessary to ask yourself the right questions regarding CASE in your business. You'll find out where you stand today, and where you need to be tomorrow to take full advantage of the tremendous potential CASE offers.

Don't get left behind. CASE is changing, and chances are you'll need to change with it. Order INPUT's new report and discover how.



CASE product growth for the first half of the 1990s is promising, but will depend on several variables. INPUT's report outlines these, presenting the most likely growth scenarios.



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Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

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## If You Are Confused about UNIX . . .

- How big is the market and where is it growing?
- What roles will UI, OSF, X/Open, and UAOS play in your future?
- How can you accommodate X Windows, Motif, XPG3, and Posix?
- What are the major players planning?
- Where is UNIX making the biggest impact?

## Come to INPUT for the Latest and Best Insights into the UNIX Market!



UNIX has been gathering strength for more than two decades, and it is now a market force to be reckoned with. Are you prepared to do the reckoning?

INPUT can help you with its new report entitled *U.S. UNIX Market*, 1991-1996. It looks at every aspect of the UNIX phenomenon: the size and growth rate of the market, the standards battles, the growing number of applications, the commitments of major UNIX players, and the thinking of major potential users. U.S. UNIX Market, 1991-1996 combines the best research and analysis available on this subject today with the most intelligent market recommendations to create one invaluable resource. If you want to succeed with UNIX, you can't do without it.

No other operating environment has the promise of UNIX—but no other environment is the subject of so much political and technological upheaval. With INPUT's report, you can find out exactly how the latest market trends will affect your plans for both the immediate future and over the next five years.

#### UNIX in the European Marketplace

From INPUT's European offices comes a new report: The Impact of UNIX on Western European Software and Services, 1991-1996. It assesses the

impact of UNIX on the European software and services industry and analyzes in depth UNIX's effects on software product, service, and equipment vendors. It gives you a thorough understanding of

- The likely development of UNIX over the next five years
- The market for UNIX systems software products, including market forecasts and growth rates for Western Europe as a whole and for 13 country markets
- User and vendor issues driving and inhibiting the growth of UNIX
- The role of standards bodies and user pressure groups

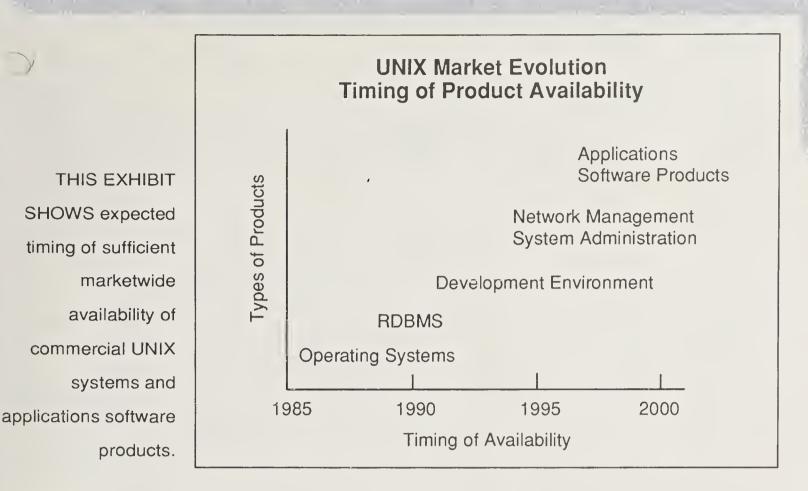
The Impact of UNIX on Western European Software and Services, 1991-1996 is essential reading for those already involved in or thinking about entering the European software and services industry.

And if you act before
June 28, 1991
you'll pay \$250 less than the
regular list price
for either report—
a 10% savings!
If you buy both reports,
you'll pay \$1000 less,
a 20% savings!

#### UNIX—A Confusing Market Clarified

It has been difficult to get a good handle on UNIX in the past, in part because it has many versions. INPUT solves that problem, analyzing the market as a whole, by product category, and by delivery mode. U.S. UNIX Market, 1991-1996 addresses such questions as:

- How big will the UNIX market be in five years, and which market segments will contribute the most to that growth?
- How are the standards proposed by UNIX International, Open Software Foundation, X/Open, and User Allian for Open Systems faring in the marketplace?
- What are the hottest new capabilities UNIX developers are working on, and how will they affect market growth?
- Where are the fastest growing markets for UNIX products?
- What are some of the large UNIX vendors offering today, and what are their strategies likely to be over the next five years?
- How is the growth of UNIX affecting the prospects for proprietary operating environments over the short term? Over the long term?



UNIX Market, 1991-1996 to you what you need to know about the forces and developments that can affect the decisions you have to make about your long-term product development, marketing, and sales strategies.

#### INPUT Tells You What Users Want

But INPUT does not stop with large-scale market research and analysis. The report also delves deep into the demand side of the market, giving you priceless information on how corporations plan to use UNIX, and what they require in the environment and in the vendors that sell to them:

 For what kinds of tasks do users consider using UNIX?

- What percentage of users are planning to use UNIX by 1996?
- Why do users consider UNIX? Why don't they?
- What are the barriers to UNIX implementation?
- How important is interoperability?
   Standards? Portability?
   Performance? Cost?
- What do users think UNIX does best? Worst?

INPUT's report *U.S. UNIX*Market, 1991-1996 was
researched and written by
senior market analysts who
have had decades of
experience watching UNIX
grow from a specialty system

used only by engineers to an operating environment that is aimed squarely at the commercial marketplace. Benefit from their research and analysis. Use the enclosed form to order your copy today!

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If You Want To Know
Exactly
How New Technologies
Are Making It in the Real
World...

- What are the issues in RDBMS implementation?
- ♦ How important are CASE tools in today's IS operations?
- What role is Al playing in IS these days?
- What are user objectives for data center management?
- How effective are the various kinds of networking technology?

## ...You'll Need INPUT's New Report on New Technology Implementation!

When new technologies are first introduced, they often sound like they'll do everything but cure the common cold. How they actually perform in the real world, however—the world of IS departments with real challenges in applications development and data center management to meet—is usually another story.

That's the story INPUT's new report on Managing Information Technology in the 1990s gives you. The report is the result of a months-long effort by a team of researchers with experience as both users and vendors of new technology and is designed to give you the truth behind the sometimes inflated claims made for untested technologies.

#### Managing Information Technology in the 1990s

#### Technology Issues

- · Implementation Inhibitors
- General Management vs. IS Management
- Implementation Effectiveness

Image Processing, CASE, Applications Development, Data Center Management

- Status
- Issues
- Effectiveness

Recommendations

The report would be a bargain at full price. But INPUT wants to offer you an even better deal.

Buy the report before January 31, 1991, and you'll pay \$250 less than the regular list price for the report—a savings of 10 percent!

INPUT's research team knows which questions to ask to uncover the truth about how these technologies are actually being used. And that kind of information can give your company a significant competitive advantage.

#### The Key Technologies

From a list of hundreds of technologies, INPUT chose the ones that offer the most potential to change the way IS departments operate:

- Artificial intelligence/expert systems
- CASE tools
- Cooperative processing
- Distributed data base management systems
- Imaging
- Networking (LANs, WANs, MANs)
- Object-oriented programming systems
- Relational data base management systems
- SAA
- UNIX and open systems
- Data center operations

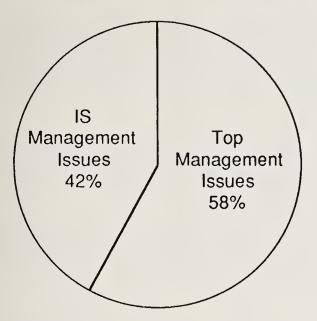
These are the developments we keep hearing about. But we rarely hear about how they work in the world *you* work in every day.

#### How Are They Really Used?

For each of these promising new technologies, INPUT's report determines to what degree their promise has been realized:

- Is interest in CASE really waning?
- I-low fast is distributed data base management technology being adopted?

#### Top Management vs. IS Management Inhibitors



- Who is driving the implementation of UNIX and open systems technology? How active is the typical IS organization in this effort? How do they rate its effectiveness, and why?
- What are the major trends in imaging? In what kinds of applications is it being used today?
   What are organizations' future plans for imaging technology?
- How are LAN, WAN, and MAN technologies being used today? What are organizations' plans for them in the future?
- How do IS managers rate the effectiveness of networking technology in their businesses?
- How are IS departments incorporating artificial intelligence and expert systems into their technology mix?
- What new ideas for meeting the maintenance challenge have been proposed? How has IS reacted?
- What are the ultimate objectives of the IS organization for data center management?

More than just a popularity profile, this evaluation focuses on the central issues governing the acceptance of any



new product or practice. How effective is it? How well does it help management solve the problems it was designed to solve? What are the inevitable issues accompanying its implementation that must be addressed?

These issues will probably play a central role in determining the ultimate effectiveness of the new technologies, so INPUT devotes much research energy to addressing them. In applications development, for example, the report ranks the five issues users find critical. INPUT then asks IS managers to quantify the time they spend developing new applications versus maintaining old ones. Within this context, the report goes on to analyze the major strategies IS is now using to address a crucial problem: the control and allocation of maintenance resources.

This kind of in-depth analysis is typical of the entire report. *Managing Information Technology in the 1990s* doesn't just give you facile generalizations. It gives you detailed, informed examinations of exactly how new technologies are faring in the real world.

This is the kind of in-depth, behind-the-scenes information that can make a tremendous difference to both user and vendor companies trying to evaluate how new technologies might actually fit into *their* world.

So get the best factual data and most penetrating analysis of new technology available. Use the enclosed form to order your copy of INPUT's report on *Managing Information Technology in the* 1990s today.

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INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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# Introducing:

the

# INPUT Computer Industry Financial Watch

A comprehensive, single source of financial data on the computer industry—and your competition

- Financial performance data on 400 U.S. public computer industry companies
- Published quarterly to provide the most up-to-date financial data available
- Company rankings by revenue, earnings, growth, and profitability
- Indispensable for all financial performance assessments

# The INPUT Computer Industry Financial Watch— What You Need To Put Your Competition In Its Place

#### Report Highlights

- Industry Summaries
- Computer Systems Manufacturers manufacturers of complete computer systems
- Computer Component Manufacturers
   manufacturers of major components for
   computer systems
- Software Products Companies—PC, mainframe and minicomputer application and systems software developers
- Processing and Network Services Companies
- Professional Services Companies companies whose primary offerings are people-based services

#### **Financial Rankings**

- Revenue Performance and Growth
- Earnings Performance and Growth
- Profitability Performance
- Compensation
- Revenue per Employee

The INPUT Computer Industry Financial Watch, is indispensable for understanding how your company ranks in the computer industry as a whole, in individual sectors of the industry, and among your top competitors—and for performing the financial performance assessments that help keep your company competitive.

Published quarterly, INPUT Computer Industry Financial Watch, offers an assessment of the financial performance of nearly 400 public, U.S.-based computer equipment manufacturers, software products developers, and information services companies. It provides comparative data on company revenues, earnings, growth, and profitability performance, and backs up this data with INPUT's expert analysis of industry trends and issues.

#### Who Needs This Report?

The INPUT Computer Industry Financial Watch is an important financial tool for:

- Presidents and vice presidents of computer and information services companies
- CFOs of computer and information services companies
- Financial analysts
- Investors and industry analysts

#### Comparative Data You Can Use Now

The Financial Watch examines the forces shaping the information services industry; ranks public companies according to sales, earnings, growth, and profitability; and tracks changes quarter to quarter.

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#### Easy-to-Read Graphical Presentation

INPUT's textual explanation is translated into graphic exhibits to provide quick, meaningful access to financial rankings and competitive information.

The Financial Watch also provides a financial profile of each company that includes market value, stockholders' equity, debt, profitability/yield information, and other crucial information about sales and earnings.

#### **Quarterly Updates**

The Financial Watch quarterly updates are based on the latest reported quarterly information to provide you with the most recent financial data available. In addition, each update includes an in-depth feature that provides greater insight into how the computer industry is developing:

- Annual compensation review
- Acquisition/merger activity
- Top performer profiles

AT A GLANCE,
you learn
where you
stand among
top competitors
in terms of
revenue
growth,
profitability,
earnings
growth, and
other key

financial

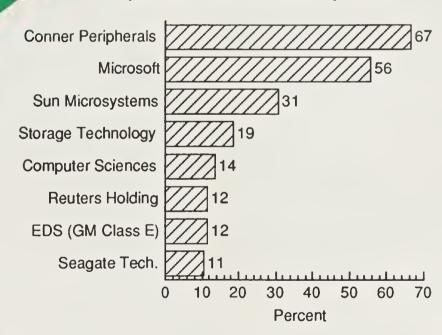
indicators.

#### Critical Information

The INPUT Computer Industry Financial Watch is the most complete financial assessment of U.S. computer companies available. Supported by INPUT's expert overview of industry trends and issues, this report provides you with the critical financial data you need to understand your competitors and where your company stands among them. Order your report today.

Single issue available now—\$295
4 issues for the next four quarters—\$495

#### **Top Revenue Growth Companies**



| Revenue        |                    |                     | Revenue (\$M)     |                  |                     |
|----------------|--------------------|---------------------|-------------------|------------------|---------------------|
| Growth<br>Rank | Company            | Change<br>(Percent) | Latest<br>4 Qtrs. | Prior 4<br>Qtrs. | Industry<br>Segment |
| 1              | Conner Peripherals | 67                  | 1,586             | 949              | CCMR                |
| 2              | Microsoft          | 56                  | 1,843             | 1,183            | SOFT                |
| 3              | Sun Microsystems   | 31                  | 3,221             | 2,466            | CSMR                |
| 4              | Storage Technology | 19                  | 1,182             | 997              | CCMR                |
| 5              | Computer Sciences  | 14                  | 1,787             | 1,566            | PROF                |
| 6              | Reuters Holding    | 12                  | 2,582             | 2,301            | '                   |
| 7              | EDS (GM Class E)   | 12                  | 6,021             |                  |                     |
| 8              | Seagate Tan        |                     |                   |                  |                     |

#### **About INPUT**

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# I s Systems Management A New Market?

# If It Is—You Need To Understand It

Understand user attitudes and environment

Know the vendors and their strategies

Know the organizations and markets that are prime candidates

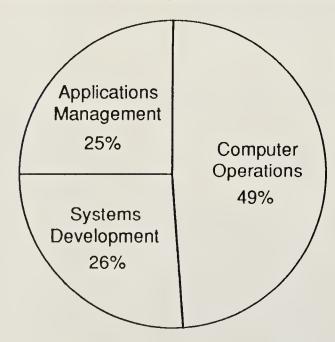
Get the facts you need to be successful

# I NPUT Can Tell You What It Is—And What You Need For Success

First there was systems integration—a strategic opportunity. Then there was systems operations, an outgrowth of systems integration and facilities management contracts, and an opportunity for many information services vendors to grow timedated projects into long-term relationships with clients.

Now, there is a further opportunity for information systems and services vendors to offer systems management services, the most exciting—and challenging—market of the 1990s. Systems management is an extension of systems integration, systems operations, and applications management and maintenance contracts.

# **External Expenditures for Systems Management Services**



USERS ARE CURRENTLY more comfortable turning over operations and retaining internal control over applications management.

Systems Management Priorities and Directions, a new report from INPUT, examines this emerging market in depth, answering such questions as:

- If a vendor offers one aspect of systems management, such as systems integration, should it offer the other services as well?
- Are systems integration users good candidates for systems operations and applications solutions?
- Are users of systems integration services likely to contract with the same vend systems operations and applications management?

More and more companies are viewing the information systems function as a drain on internal resources and strategic corporate goals. They are also viewing outsourcing of this function as a logical solution to internal pressures on budgets, skills accumulation and capital outlays.

This report probes the:

- Major reasons companies contract for systems management services
- Conditions that would lead companies to seek different vendors for different services or use a single vendor for all systems management services
- Types of user organizations that are candidates for total systems management services

Systems Management Priorities and Directions defines this market and assesses the requirements for participation. Vendor systems integration, operations, and management services were interviewed to gain insight into:

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#### Dear Colleague:

Systems management is becoming a major factor in the information services industry. You need to respond to this market dynamic with knowledge and efficiency. *Systems Management Priorities and Directions*, a new report from INPUT, pinpoints the business environment and driving forces that are creating new opportunities for information systems and services vendors.

What are the success factors involved in this service? Systems management services entail a new kind of long-term relationship between vendor and client. How do you accomplish this?

Know how to work with your client to produce a long-term relationship—increase your revenue—and your competitive position.

"A good systems management relationship presupposes a certain kind of client, one whose concern for solutions overrides any concern with where that solution originates."

Find the best candidates and best industries in which to focus your marketing goals.

Know the risks—to yourself and your client.

"The decision to outsource development and/or management is not easily reversible—the total impact on the organization must be considered."

Systems Management Priorities and Directions has the fact-based analysis that supports your strategic decision-making. And it gives you the benefit of its expertise in all aspects of the information services industry.

Purchase Systems Management Priorities and Directions and position yourself in this new and exciting market for the 1990s.

Sincerely,

John Frank, President, INPUT, INC.

P.S. Order Systems Management Priorities and Directions before December 20, 1991 and deduct 10% from the fee. You will save \$250.





#### SAVE 10% IF YOU ORDER BY DECEMBER 20, 1991!



#### **ORDER FORM**

YES! I need INPUT's report, Systems Management Priorities and Directions.

Please complete all three of the following sections and return the form by mail or fax (see below), or call in your order.

| SECTION ONE:<br>MY ORDER   | Send me copy (copies) of INPUT's report, Systems  Management Priorities and Directions.  I want to pay \$2,245 each*, a savings of 10% off the regular price. I'm ordering before December 20, 1991. |   |  |  |
|--|--|---|--|--|
|  |  |   |  |  |
|  | ☐ I'm ordering after December 20, 1991, for the regular price of \$2,495 each*.  |   |  |  |
|  | * California clients: Please add applicable  | sales tax on 70% of purchase price.   |  |  |
| SECTION TWO:<br>TERMS OF PAYMENT                                   | ☐ Enclosed is my check for \$  | to cover the cost of my order.  |  |  |
| (CHOOSE ONE)   | ☐ Charge \$ to my American Express card: Card #  |   |  |  |
| . )  | Exp. date Name as it appears on my card  |   |  |  |
|  | ☐ Please invoice my company for number  Payment (U.S. dollars) is required with  | on purchase order on thirty (30) days of invoice date. (First-time buyers shipped immediately upon receipt of payment in full.) |  |  |
| SECTION THREE:   | Please see conditions on the other side of page.   |   |  |  |
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| INPUT<br>1953 Gallows Road   | Organization   | Signature   |  |  |
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|  |  | Title   |  |  |
| or<br>1280 Villa Street<br>Mountain View                           | Address  | Date  |  |  |
| CA 94041-1194<br>Tel. (415) 961-3300<br>Fax/ ) 961-3966            |  |   |  |  |
| Signature Date   |  | Date  |  |  |

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#### Report Highlights

#### General Business Environment

- · Forces Driving Change
- Business Responses to the New Environment
- IS Organizations in the 1990s
- Information Systems Strategies— Outsourcing
- Systems Management Requirements
- Systems Management Options

#### **Market Trends**

- Buyer Issues
- Systems Integration Market, 1991-1996
- Systems Operations Market, 1991-1996
- Systems Management
- Vertical Industry Opportunities

#### Systems Management Vendors

- Vendor Classification
- Vendor Profiles
  - Description of Principal Business
  - Markets Served
- Business Objectives

Conclusions and Recommendations

- Why IS organizations contract for their services
- What alliances they have created to become a full-service vendor
- · How they market their services
- How they manage the client relationship

INPUT's surveys reveal that many users would prefer end-to-end services to free them to concentrate on their core businesses, to bring down operating costs, or to enable the flexibility that comes from accessing the necessary skills just when they are needed. That's where systems management comes in.

What components of current SI and SO forecasts cover companies that will be seeking a complete systems management package?

Whe applications management component of stems management focus more on maintaining packaged software or on client-specific customized code?

Who are the major vendors offering systems management services, and what are their apparent strategies?

What forces drive vendors to provide valueadded management services that go beyond their standard offerings?

Some industry markets are better candidates for systems management relationships. INPUT's research has identified opportunities in the following industry sectors:

- Federal government
- State and local government
- Discrete manufacturing
- Banking and financial services
- Utilities

The report further reviews the offerings of leading vendors in the U.S. market: describing each vendor's principal business, how that relates to its systems management strategies, and the markets it serves.

INPUT believes that there is an emerging market for systems management services—services that comprise systems integration, systems operations, applications maintenance, and applications management.

In fact, systems management is shaping up to be one of the most exciting new markets of the 1990s.

Order Systems Management Priorities and Directions today and get the answers you need to plot your strategic plans for involvement in this opportunity.

Call, fax, or mail your order to any INPUT office listed on the back of this brochure.



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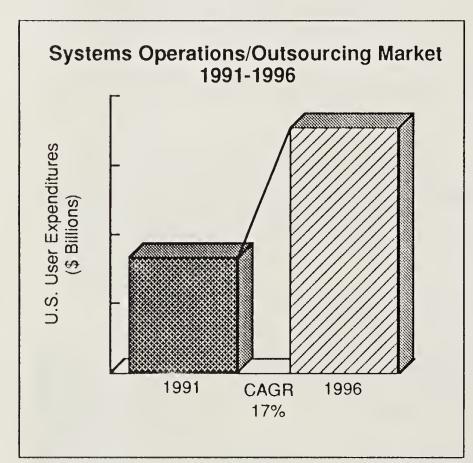


# The Forces That Drive the Systems Operations/ Outsourcing Market

- > What Are They?
- > Where Are the Opportunities?
- > What Market Strategies Succeed?
- > How Big Is the Market?
- ➤ How Fast Is It Growing?
- What Skills and Attributes Does a Vendor Need?

# INPUT Answers These Questions in Its Systems Operations/Outsourcing Report

Systems operations continues to be the major component of the outsourcing market, which is dynamic and rapidly changing. Unless you have the objective, fact-based analysis that INPUT provides in its new report, U.S. Systems Operations/Outsourcing Market Analysis, 1991-1996, you can't take advantage of the opportunities.



We all know that the U.S. economy is affecting business growth. And we know that enterprises are looking for ways to reduce costs: there is a strong drive to return operating funds to core business activities and, at the same time, IS organizations want to increase their flexibility to respond to technology changes. One way enterprises do both and still maintain a competitive edge is by outsourcing some or all of their information systems operations. That is why systems operations/outsourcing is such a major growth market for information services vendors in the 1990s.

#### Vertical-Market Opportunities

INPUT has analyzed the systems operations/ outsourcing market opportunities in 15 vertical-market sectors. INPUT researchers specifically looked for unique SO challenges within each sector.

These analyses give you data about the particular forces within each market. You can pattern your marketing goals to address the special dynamics of any industry and can compete successfully.

- What is the rate of growth in each commercial sector? In the federal and state- and local-government sectors?
- What is the difference in growth rate between platform and applications operations?
- What are the unique information systems requirements that need to be addressed?
- What are IS management's selection criteria, and how do you qualify?



1953 Gallows Road, Suite 560, Vienna, VA 22182 Tel. (703) 847-6870 Fax (703) 847-6872

#### Dear Colleague:

Economic conditions are changing the way people handle their information-processing requirements—and these economic conditions will not go away tomorrow. More and more enterprises are looking for ways to streamline their systems operations and return operating funds to core business activities. They are outsourcing their systems operations to vendors.

INPUT, in a new report, *U.S. Systems Operations/Outsourcing Market Analysis,* 1991-1996, presents a comprehensive analysis of the outsourcing market. This study includes a forecast of the outsourcing market for the 1991 to 1996 period. The report details the special requirements of 15 different industry groups and thoroughly examines the strategies of leading vendors that are aggressively moving into the market. The report also provides INPUT's expert recommendations for success in the market.

Information services and software will be a different market in the 1990s. More vendors will become full-service providers. Long-term relationships with clients will be an important part of market strategies. Clients will rely on vendors to keep up with technology advances, provide expertise, and keep the client competitive.

*U.S. Systems Operations/Outsourcing Market Analysis, 1991-1996* gives you the information you need to restructure your organization to meet these challenges. It presents user views and vendor strategies that you can incorporate into your own marketing plans.

Please review the enclosed brochure to see what you can gain from this report—then fill out the enclosed order form for your copy. You can't afford not to have this important study if you are interested in the 1990s market for outsourced systems operations.

Best regards,

John Frank, President

INPUT, INC.

P.S. I strongly suggest you save \$300 by ordering this report by January 15, 1992.



#### **ORDER FORM**

YES! I want INPUT's report, Systems Operations/Outsourcing Market Analysis, 1991-1996.

Please complete all three of the following sections and return the form by mail or fax (see below), or call in your order.

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#### **Vendor Characteristics**

Leading vendors have taken a renewed interest in the systems operations market. Through their recent activities they sent strong signals that they plan to aggressively pursue major contracts. INPUT's ongoing review and analysis of information systems and services vendors is without peer. You get the benefits of this analysis for your competitive positioning.

For this report, INPUT conducted in-depth interviews with vendors active in the SO market. The respondents represented about 0% of the systems operations/outsourcing revenue. Research answered the following questions:

- Who are the leading SO vendors?
- What markets are they targeting?
- What are their business backgrounds?
- What strategies lead to long-term SO contracts?
- IIow do vendors create win-win relationships between vendor and client?

U.S. Systems Operations/Outsourcing Market Analysis, 1991-1996 gives you in-depth, tactical, and strategic analysis that makes sense—and provides clear recommendations that leading information services vendors have relied on for years.

Systems operations is the most challenging and, potentially, the most profitable market of the 1990s. You have many competitors. If you want to be successful, you need INPUT's market expertise to chart your course through ese challenges and come out a winner.

Don't hesitate. The opportunity is there. Fill out the enclosed order form today.

#### Summary of Contents

#### Market Analysis and Forecast

- · Systems Operations and Outsourcing
- General Market Characteristics
- Systems Operations Types

#### Market Forecasts

#### Key Marketplace Factors

#### Competitive Environment

- Leading Systems Operations Vendors, 1990
- Acquisition Activity
- Client Buy-Ins

## Vertical-Industry Markets (15 markets analyzed)

- Industry Forces
- Impact on Information Systems and Services
- Impact of Systems Operations Potential
- Systems Operations Forecast

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# The Systems Operations/Outsourcing Market Is Changing

# Be Prepared to Change With It

Use INPUT's Systems Operations/ Outsourcing: Vendor Analysis report to:

- Identify the leading vendors in the systems operations/outsourcing marketplace today
- Understand the origins of the leading vendors and how their roots affect their strategies in this marketplace
- Discover how systems operations/outsourcing is being offered and what the trends are in delivery modes
- Learn how the leading vendors will behave in the market in the next three years
- Examine the potential of the federal versus the commercial SO market

# Essential Reading on the U.S. Commercial and Federal Systems Operations/Outsourcing Market—from INPUT

Pressure to reduce operating costs, management's greater need to focus on core business functions, and the growing challenge to keep up with technology changes, have combined with other forces to make systems operations one of the strongest growth elements of the outsourcing market in the information services industry.

With this growth comes significant opportunity for vendors. But strong growth potential alone doesn't lead to certain success. You need to know how to maneuver in this market, and you need to know what your competition is doing. INPUT gives you that knowledge in the report, Systems Operations/Outsourcing: Vendor Analysis.

#### Report Highlights

#### Market Overview

- Systems Operations Market Forecast, 1991-1996
- Leading Vertical Industry Markets
- Systems Operations Driving Forces
- Systems Operations Vendor Classification
- · Vendor Strategies

#### Competitive Structure

- · User Trends and Issues
- Vendor Business Objectives
- Vendor Ranking

#### SO Vendor Profiles

- Key Contacts
- Description of Principal Business
- · Service Characteristics and Capabilities
- Markets Served
- Competitive Position
- Recent Events
- Organization
- Alliances
- Marketing Strategy
- Customer Base
- Future Directions

#### Comparative Analysis

- Financial Characteristics
- · Strategies and Markets
- Proprietary Products/Technologies

#### Recommendations

#### Adapting to New Market Forces

INPUT has identified four classes of systems operations vendors: professional services firms, processing services firms, equipment manufacturers, and "other" firms (such as banks). INPUT's comparative analysis of these vendor classes not only reveals important insights into systems operations in general, but also explains the origins of successful outsourcing vendor strategies.

- How could professional services vendors gain a competitive edge in the bidding process?
- How does revenue distribution based on equipment ownership vary for the different classes of vendors? How will this change over the next three years?
- For all vendors, what portion of revenues are derived from client- and vendor-developed applications? How is this likely to affect the trend towards industry specialization and the growth in applications management opportunities?

#### What Is Your Competition Doing?

Within these identified vendor categories, INPUT presents detailed profiles of leading systems operations/outsourcing vendors. These profiles are designed to give you a thorough analysis of the trends and issues affecting the SO market, answering questions such as

 What percentage of vendors' revenues are derived from fixed-price, transaction volume, and resource utilization contracts? How will market developments change this?

#### Dear Colleague:

Take full advantage of the opportunities in the changing outsourcing market. Understand the dynamics of this fast-paced business area.

As a systems operations/outsourcing vendor, you need to know what your competitors are doing:

- Are the market leaders strengthening their leads?
- Are new vendors entering the market?
- What new forms of outsourcing may be emerging that present new opportunities?

Today's outsourcing market continues to expand at a healthy 17% growth rate. Information systems organizations are turning more and more to vendors to manage their information technology requirements.

INPUT's report Systems Operations/Outsourcing: Vendor Analysis identifies the leading systems operations vendors, assesses their strategies, and reports on changing demands in the user community. It not only reports on trends, but also projects how the market will change and where the new opportunities can be found.

The key element of the report is the set of vendor profiles developed after extensive interviews and background research. Since this market is changing so fast, INPUT includes a profile update service as part of the purchase of this report. Periodically, the vendor profiles contained in the report are updated to reflect the latest significant events in the market.

Don't miss out on the current systems operations opportunities. Fill out the enclosed form today to order your copy of INPUT's Systems Operations/Outsourcing: Vendor Analysis.

Sincerely,

Jean-Paul Richard

Outsourcing Program Manager

Jean-Paul Richard



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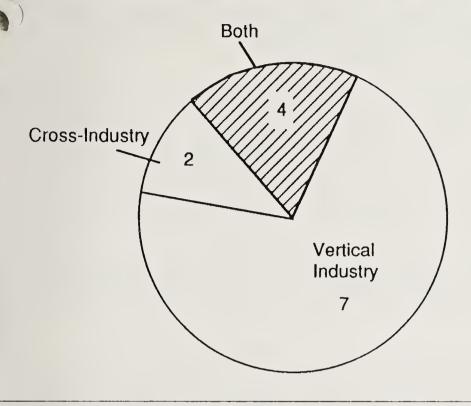
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#### **Systems Operations Vendors' Market Focus**



INPUT's analyses offer complete assessments of individual vendor activities, as well as discussions of how vendors' market strategies compare.

- What percentage of vendors' new business comes from the existing client base and from new clients?
- What methods are vendors using to capture new business?
- What percentage of each vendor's contracts are for federal versus commercial projects? Is federal and commercial business on the rise or decline?
- How are vendors specifically using alliances to enhance their service offerings?

Systems Operations/Outsourcing: Vendor Analysis provides the most in-depth analysis of vendor systems operations activity available. Unlike most market research, this report is not based on theory. INPUT interviewed leading vendors to learn what is actually happening with their systems operations business—real-life information you can use to make intelligent marketing decisions.



#### Market Updates

Included with the purchase of Systems Operations/Outsourcing: Vendor Analysis are INPUT's 1991 profile updates. Published throughout the year, the updates report on significant events in the businesses of profiled vendors as well as provide new vendor profiles. With the purchase of one report, you stay up-to-date on how events and trends in the industry actually affect the vendors that support it.

#### New Trends . . . New Opportunities

There's no question that the systems operations/outsourcing market is changing—and offering significant new opportunities. To be successful, vendors need to adapt their strategies to conform to emerging new user requirements and market trends. INPUT tells you how. The new report Systems Operations/Oursourcing: Vendor Analysis provides in-depth analysis of the forces affecting the market and complete examination of how some of the leading vendors are responding to them.

If you're serious about moving ahead in the market, this report is essential reading. Use the enclosed form to order your copy today.

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# Do You Need to Know What Users Really Think about Outsourcing . . .

- Which vendor qualifications are essential?
- Which users ultimately make the decision?
- How do you survive the preliminary screening?
- What are the crucial personnel pitfalls?
- How do users try to control the relationship?

Get your
answers now
and save
money too

# ... INPUT Tells You Exactly What Outsourcing Users Want from You!

Everybody's heard the anecdotes about outsourcing. Now it's time for comprehensive analysis based on firsthand data, a study that gives vendors crucial insights into exactly what the target market wants and why.

INPUT has just published a report entitled Systems Operations Buyer Issues and Alternatives. This is not industry gossip. It is a systematic study based on hard, firsthand information about exactly how users address the thorny issues of evaluation, contract structure, cost, performance measurement, transition, and personnel.

It gives you an unprecedented window on the decision-making processes that will affect your sales and marketing success in systems operations.

#### Report Contents

#### Selection Process

- Solicitation Development
- · Solicitation of Bids
- Evaluation Techniques
- Selection of a Vendor

#### **Contract Negotiations**

- Negotiating Team
- Contract Content
- Negotiation Summary

#### **Transition Period**

- Transition Duration
- Transition Schedule
- Vendor/User Relations
- Personnel Incentives
- Control Strategies

Case Study I: Bank South

Case Study II: BICC Cables

Case Study III: Kodak Network

Conclusions and Recommendations

And if you act before July 19, 1991, you'll pay \$250 less than the regular list price for the report—a savings of more than 10 percent!

This report examines every major element of the three phases of a typical systems operations decision: the selection process, contract negotiations, and the transition period.

But this report goes even further—it offers you three detailed case studies of large companies that made the decision to sign major systems operations contracts. Each case study provides insight into the history of the company, its motivations for change, how it found and evaluated a vendor, and how the ongoing relationship works. The studies end with concisummaries that highlight what vendors can lead about general market conditions and requirements.

The report is a gold mine of specific information. INPUT's research staff has asked the questions that allow you to understand aspects of the outsourcing decision that have never been clear before:

- In what order of importance do users rank pricing, security, personnel transfer, backup, systems operations experience, flexibility, and eight other vendor qualifications?
- What are the criteria for eliminating vendors from consideration during the preliminary review?
- What role does a tour of client sites play in most users' evaluations?
- How important are technical issues in users' evaluations?
- How do users weigh the cost issue?
- Which users are typically involved in the evaluation phase?
- In the contract negotiation phase?

#### **ORDER FORM**

I want to know the details on what users think about outsourcing. I want a copy of INPUT's report, Systems Operations Buyer Issues and Alternatives.

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INPUT also provides detailed case studies about how three companies established ongoing outsourcing relationships. Throughout each of these case studies, INPUT concentrates on precise data and analysis. Exactly why did a large southern bank choose outsourcing? How did a large manufacturer handle the transition phase? How did the manufacturer manage the termination of one-third of the IS department? How did the telecommunication department of a second manufacturer find the right vendor? What kinds of service does that vendor provide?

#### **Network Management vs. Data Center Outsourcing**

| Attribute            | Networks    | Data Center |
|----------------------|-------------|-------------|
| Asset location       | Distributed | Central     |
| Asset ownership      | Many owners | Usually one |
| Boundary delineation | Fuzzy       | Crisp       |
| Operating systems    | Many        | Few         |
| People location      | Distributed | Central     |

Source: Digital Equipment

HOW DETAILED does INPUT get? This exhibit summarizes the major differences between network management and data center outsourcing.

In addition to the above considerations, INPUT delves into questions that can affect how you handle the stresses and complexities of these outsourcing relationships:

- Which qualifications do users demand?
- To which are users surprisingly indifferent?
- How long is the typical evaluation process?
   The typical contract negotiation?
- How are contracts structured? How is performance measured?
- What technical issues are included in most contracts, and why?
- What are the crucial personnel issues mentioned in most contracts?
- What kinds of issues do you have to manage in a transition?
- What kind of personnel strategies can you use to motivate key people in an uncertain transition?
- What precise strategies do users employ to control the relationship with systems operations vendors?

The report provides much more information that can help you shape your sales and marketing position to the actual needs of companies that need real-world systems operations solutions today.

INPUT's report on *Systems Operations*Buyer Issues and Alternatives gives you more than just information. It opens a window on the decision-making processes of the people you have to influence to succeed in this marketplace.

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# Do You Need to Know What Users Really Think about Outsourcing...

1)

- Which vendor qualifications are essential?
  - Which users ultimately make the decision?
    - How do you survive the preliminary screening?
      - What are the crucial personnel pitfalls?
        - How do users try to control the relationship?

# ... INPUT Tells You Exactly What Outsourcing Users Want from You!

Everybody's heard the anecdotes about outsourcing. Now it's time for comprehensive analysis based on firsthand data, a study that gives vendors crucial insights into exactly what the target market wants and why.

INPUT has just published a report entitled Systems Operations Buyer Issues and Alternatives. This is not industry gossip. It is a systematic study based on hard, firsthand information about exactly how users address the thorny issues of evaluation, contract structure, cost, performance measurement, transition, and personnel.

It gives you an unprecedented window on the decision-making processes that will affect your sales and marketing success in systems operations.

### Report Contents

### Selection Process

- Solicitation Development
- Solicitation of Bids
- Evaluation Techniques
- Selection of a Vendor

### **Contract Negotiations**

- Negotiating Team
- Contract Content
- Negotiation Summary

### **Transition Period**

- Transition Duration
- Transition Schedule
- Vendor/User Relations
- Personnel Incentives
- Control Strategies

Case Study I: Bank South

Case Study II: BICC Cables

Case Study III: Kodak Network

Conclusions and Recommendations

And if you act before July 19, 1991, you'll pay \$250 less than the regular list price for the report—a savings of more than 10 percent!

This report examines every major element of the three phases of a typical systems operations decision: the selection process, contract negotiations, and the transition period.

But this report goes even further—it offers you three detailed case studies of large companies that made the decision to sign major systems operations contracts. Each case study provides insight into the history of the company, its motivations for change, how it found and evaluated a vendor, and how the ongoing relationship works. The studies end with concise summaries that highlight what vendors can learn about general market conditions and requirements.

The report is a gold mine of specific information. INPUT's research staff has asked the questions that allow you to understand aspects of the outsourcing decision that have never been clear before:

- In what order of importance do users rank pricing, security, personnel transfer, backup, systems operations experience, flexibility, and eight other vendor qualifications?
- What are the criteria for eliminating vendors from consideration during the preliminary review?
- What role does a tour of client sites play in most users' evaluations?
- How important are technical issues in users' evaluations?
- How do users weigh the cost issue?
- Which users are typically involved in the evaluation phase?
- In the contract negotiation phase?

INPUT also provides detailed case tudies about how three companies established ongoing outsourcing relationships. Throughout each of these case studies. INPUT concentrates on precise data and analysis. Exactly why did a large southern bank choose outsourcing? How did a large manufacturer handle the transition phase? How did the manufacturer manage the termination of one-third of the IS department? How did the telecommunication department of a second manufacturer find the right vendor? What kinds of service does that vendor provide?

### Network Management vs. Data Center Outsourcing

| Attribute            | Networks    | Data Center |
|----------------------|-------------|-------------|
| Asset location       | Distributed | Central     |
| Asset ownership      | Many owners | Usually one |
| Boundary delineation | Fuzzy       | Crisp       |
| Operating systems    | Many        | Few         |
| People location      | Distributed | Central     |

Source: Digital Equipment

HOW DETAILED does INPUT get? This exhibit summarizes the major differences between network management and data center outsourcing.

In addition to the above considerations, NPUT delves into questions that can affect how you handle the stresses and complexities of these outsourcing relationships:

- Which qualifications do users demand?
- To which are users surprisingly indifferent?
- How long is the typical evaluation process?
   The typical contract negotiation?
- How are contracts structured? How is performance measured?
- What technical issues are included in most contracts, and why?
- What are the crucial personnel issues mentioned in most contracts?
- What kinds of issues do you have to manage in a transition?
- What kind of personnel strategies can you use to motivate key people in an uncertain transition?
- What precise strategies do users employ to control the relationship with systems operations vendors?

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# INPUT

When You Need the Best Available Intelligence on Systems
Operations
Opportunities...

- ⇒ How big is the market?
  - Which vertical industry market is growing fastest?
    - What are the major decisions for buyers?
      - ⇒ Who are the leading vendors?
        - ⇒ What forces are driving market growth?

# ... You Need INPUT's New Systems **Operations Market Report!**

The systems operations market is hot right now, with great potential for long-term growth. But how big is it? Where and when is that growth going to occur? And how can you take advantage of the best opportunities?

INPUT has just released a new research report that was written to give you exactly this kind of focused market intelligence. Entitled U.S. Systems Operations Market, 1990-1995, the report is a distillation of the primary research and informed analysis that only INPUT can bring to bear on this subject.

### Report Contents

### Market Analysis and Forecast

- A. Market Structure
- B. Market Forecasts, 1990-1995
- C. Key Marketplace Factors
- D. Competitive Environment

### Vertical Markets for Systems Operations

- A. Banking and Finance
- B. Discrete Manufacturing
- C. Education
- D. Insurance
- E. Health
- F. Process Manufacturing
- G. Retail Distribution
- H. State and Local Government
- I. TransportationJ. Telecommunications
- K. Wholesale Distribution
- L. Utilities
- M. Business/Technical Services
- N. Personal/Consumer Services
- O. Miscellaneous Industries

### Market Strategies and Recommendations

- A. Market and Opportunity Identification
- B. Marketing and Sales
- C. Partnership Management
- D. Recommendations

Research like this can take a lot of the guesswork out of your product development, marketing, and sales decisions.

And if you act before May 17, 1991, you'll pay \$300 less than the regular list price for the report—a savings of 10 percent!

This is the only single-volume systems operations market report available today that gives you precisely the information you need to make good decisions, and in a concentrated format that you can put to use immediately.

### **Broad-Market Questions**

U.S. Systems Operations Market, 1990-1995, addresses the important questions that you have to answer to shape your company's future market presence:

- What is the total market size? What is its projected annual growth rate over the next five years? What will the total market size be in 1995?
- What are the differences in the sizes and growth rates of the systems operations market by delivery mode (professional services and processing services) and by type (platform and applications)?
- Which forces are driving users to consider and contract for SO?
- Which forces are inhibiting market growth, and how do you deal with them?
- Who are the major competitors in this market?
- Why is the federal government a growth market even in these days of tight budgets?
- What can you do to position yourself to fully exploit this opportunity?

And many others concerning every aspect of the systems operations markets now and through 1995.

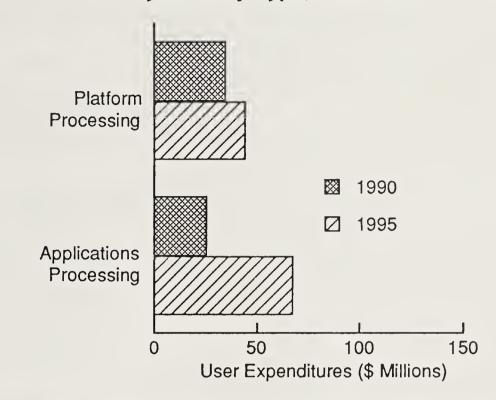
### Get the Specifics

The report also gives you more specific intelligence on how to best segment this market, what users really want, and how different industries evaluate the costs and benefits of systems operations:

- What are the nine primary motivations buyers have to contract for systems operations services in general?
- How do buyers rank these motivations in order of importance?
- For each of 16 vertical markets, what forces are shaping systems operations. How are these forces affecting the market for SO, what is the IS environment like, and what is the SO potential?
- What are the sizes and compound annual growth rates of these 16 market segments?
- What are the impacts of deregulation, the thrift crisis, and the commercial real estate slump on SO in banking and finance?
- What has the decade-long push to automate the factory floor done for the IS environment in discrete manufacturing, and where are the SO opportunities?
- What is the SO potential in the insurance industry, where the potential entry of such new competitors as banks, hospitals, and foreign insurers has some domestic insurers worried about market share?

This report addresses all of these questions, giving you invaluable in-depth research and analysis put together by one of the most respected research and consulting organizations in the information services industry.

### Telecommunications Industry Systems Operations by Delivery Type, 1990-1995



THE LEVEL OF DETAIL provided by the report is evident in this exhibit, which gives the size and growth rates of the two main delivery types for systems operations in a specific industry.

This report is more than just numbers—it offers you incisive analysis of these market data, an analysis that puts at your disposal the accumulated expertise of some of the finest minds in the business.

The opportunities in systems operations are there. But to exploit them fully, you need more than just a back-of-the-envelope plan. You need INPUT's report *U.S. Systems Operations Market*, 1990-1995. Use the enclosed form to get your copy today!

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# When You Have To Analyze Significant Systems Operations Opportunities...

- Why are companies buying and not buying?
- ▲ What do users say they want from vendors?
- ▲ What kinds of expertise do you need?
- ▲ What are your competitors doing?
- ▲ How big is the market?

# You Need Market Intelligence and Analysis from INPUT!

INPUT just made it easier for you to take advantage of one of the most dynamic opportunities available in the information services business.

Systems operations has everything you could want for a strong and stable business: large contracts, long-term commitments, and robust growth. All you need to exploit its full potential—and avoid its many pitfalls—is timely, firsthand market intelligence enhanced by the analysis of some of the finest minds in the industry.

INPUT has just released a report that offers vendors exactly that. Entitled *Systems Operations Management Issues and Practices*, the report is the result of an extensive research effort focused sharply on the systems operations market, including issues such as why companies contract or don't contract, what will motivate them to consider systems operations, and how successful contracts are managed.

To understand the needs and the market, researchers discussed issues and requirements with vendors and large and small users in

### Systems Operations Major Trends

- Growing Financial Constraints
- Growing Competition
- Growing Complexity of Technology
- · Lack of Skilled Personnel

numerous industries. They drew upon the resources and expertise of executives that have managed operations, and executives responsible for developing information systems.

If you act before February 15, 1991, you'll pay \$200 less than the regular list price for the report—a savings of 10 percent!

The report gives you hard data and informed analysis on every aspect of the systems operations market. For people who need to evaluate the large-scale issues in the market, the report answers the following kinds of questions:

- How big is the systems operations market?
- How fast will it grow over the next five years?
- Which segments of the market are growing fastest? Slowest?
- What impact will globalization have on systems operations decisions?
- How important will telecommunications and networking expertise be in the coming market for systems operations?
- How do equipment lease/purchase decisions affect the federal systems operations market?
- What is the next major area of systems operations growth?
- Who are the five leading systems operations vendors, and what are they doing right?
- How do most vendors structure their systems operations business?
- How important are alliances to systems operations contracts?

And a host of others that will define how you address the strategic facets of your systems operations decisions.

In addition, the report gives vendors invaluable insight into exactly how user companies are evaluating systems operations and making their

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### Dear Colleague:

You know how tempting the systems operations market opportunity is, with its demonstrated growth and revenue potential. Matching your company's strengths with that opportunity, however, takes careful planning and analysis based on the truth about what's happening in a very complex field.

That's what INPUT's latest report, Systems Operations Management Issues and Practices gives you. In six concise chapters filled with data that have been interpreted by some of the best minds in the industry, this report gives you a detailed portrait of the systems operations market opportunity.

How big is the market? What are the factors that will cause companies not contracting for systems operations today to do so in the future? INPUT's report answers these questions, and many others.

To really succeed in this complex field, you need more than technical expertise and the right service offerings. You have to know where the market is, what users say they want and need, where the demand really is, and where the unexpected pitfalls are.

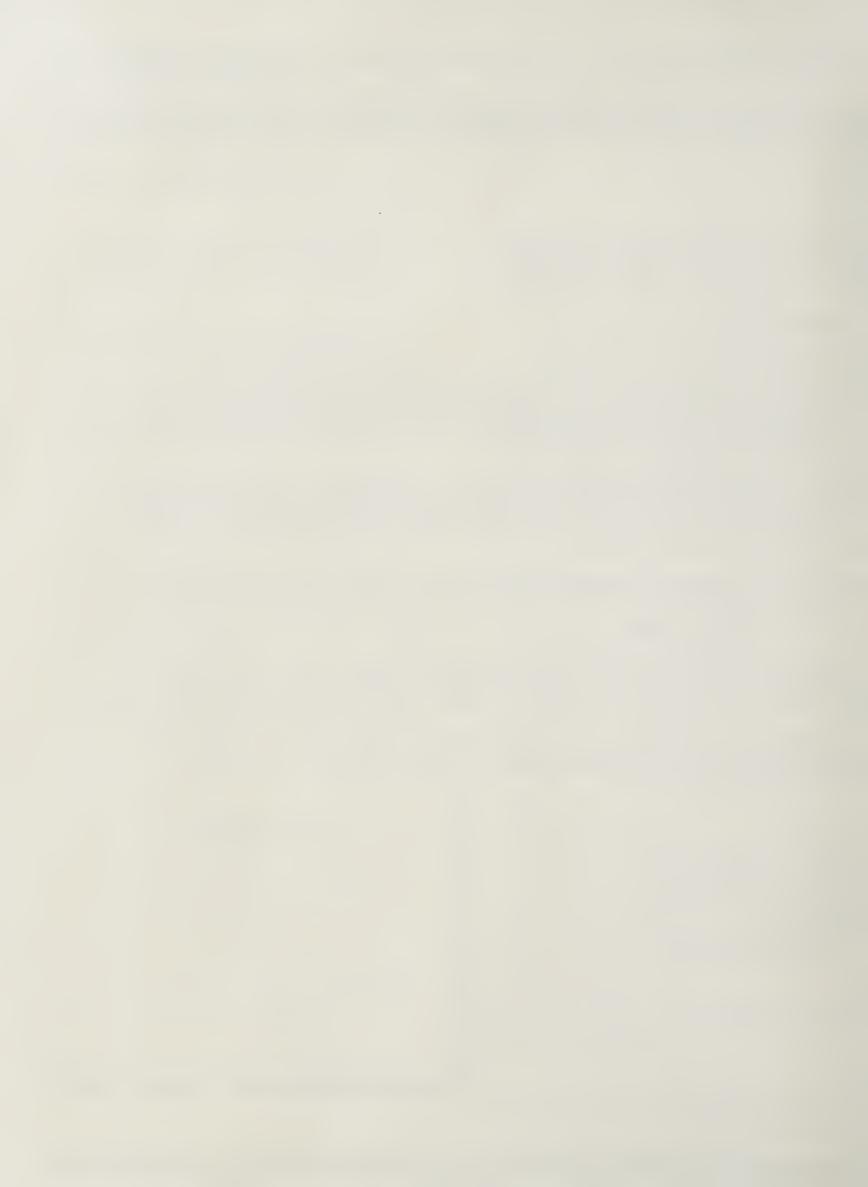
Systems Operations Management Issues and Practices gives you all of this, and more. So why not put this research to work for you? Get a copy of INPUT's report today.

Regards,

John Frank

President, INPUT, INC.

den E Trank



### **ORDER FORM**

YES! I have to have competitive intelligence about the systems operations markets. I need INPUT's report on Systems Operations Management Issues and Practices.

I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections.

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|---|---|--------------------------------|--|--|
| SECTION TWO: TERMS OF PAYMENT                         | · ·   | to cover the cost of my order. |  |  |
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| . /   | ☐ Please invoice my company for \$ on purchase order number   |                                |  |  |
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decisions to either enter the market or stay out of it for now. The report gets down to a level of tactical detail that you can't find anywhere else:

- What are the major reasons users decide to contract for systems operations services?
- In what order of importance do users rate security, cost, understanding of the user's business, and the overall importance of the IS function in making the contracting decision?
- What roles do expense control and capital conservation play in contracting decisions?
- What are the most common approaches to contract pricing?
- What are users' responses to common personnel issues, and how can you prepare for them?
- How have user IS organizations hampered users' attempts to get systems operations evaluated, and how can you fight back?
- What role does ensuring the availability of information play in this decision?
- What role do geographically dispersed operations play in the systems operations decision?
- What are the multiplatform/multistandard arguments against?

Plus questions about cost issues, capital conservation, multivendor networked environments, and more. The report closes with a comprehensive set of conclusions and recommendations that crystallize the relevant data and our consultants' thinking on this complex and tempting market opportunity.

The market opportunity is tempting. But you have to have exactly the right kind of competitive intelligence to exploit it.

NPUT gives it to you. Use the enclosed form to order your copy of *Systems Operations Management Issues and Practices* today!

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### Systems Operations Management Issues and Practices

### Market Overview

- Systems Operations Forecast
- Systems Operations Options
- Systems Operations Vendors
- · Market Forces and Issues

### User Issues

- Buying Practices
- Contract Types
- Personnel Issues
- Vendor Relations
- · Trends and Benefits

### **Vendor Practices**

- Organization
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- Contract Types
- Personnel Issues
- Customer Relations
- Major Trends

Conclusions and Recommendations

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Provides specific, detailed procurement information as well as forecast of federal government markets for computer systems, telecommunications, and information services.

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Market Bulletins Reports on specific agency practices affecting

procurement.

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procurements.

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immediate questions on federal IS procurements and trends, competitive and teaming information,

etc.

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developments affecting federal procurements and

markets.

Client Conference Address key IS acquisition issues and network with

executives from other INPUT clients.

Client Meeting/Breakfast Presentations and discussion of research results

and market issues.



# Federal Information Systems INPUT® and Services Program



Provides lead information and qualification of federal IS procurements. Analyzes specific market areas, such as systems integration and professional services, providing five-year forecasts and survey results from both agencies and vendors.

### BENEFITS

INPUT's FISSP will help you:

- Avoid hiring personnel to locate and track programs of interest
- Receive assistance in locating teaming partners
- Learn of agency initiatives and qualified leads while minimizing searches and improving staff
- Make informed decisions on planning and resource allocations
- To take advantage of INPUT's government contacts and insight

### PROGRAM DESCRIPTION

### PROCUREMENT ANALYSIS REPORTS

Reports include the following information:

Agency Name Program Title

Funding by Fiscal Year

Procurement Schedule Target Dates

Draft

- CBD Announcement
- Pre-Bid Conference
- RFP-RFQ Release
- · Bid Due Date
- Award Date

Description of Program

Systems/Services to be Acquired

Contract Types Contract Duration

Contracting Office (name and address)

Program Office (name and address)

Background/Function

Analysis

Acquisition Plan

Awards to Date

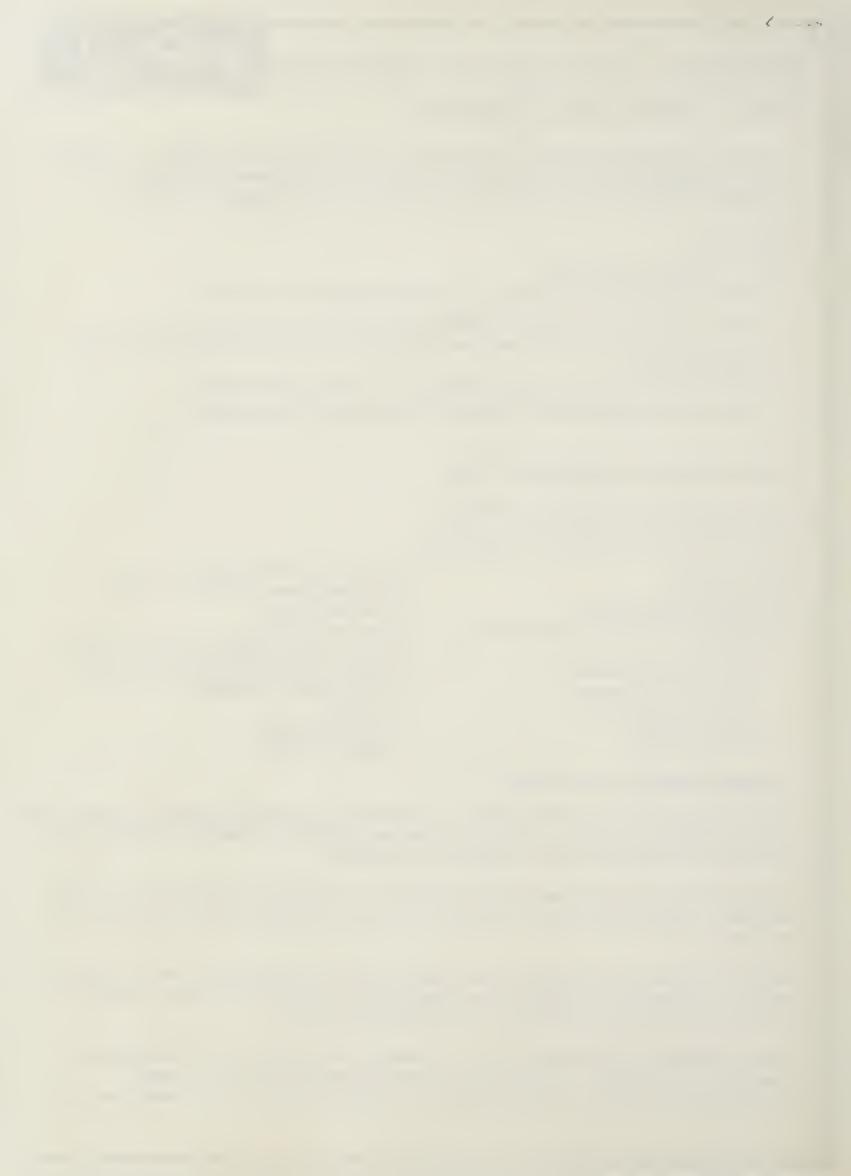
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Federal Software and Related Services Market—Updates general software and Ada forecasts, and provides a new forecast for UNIX- and CASE-related products and services.

Federal Professional Services Market—Forecasts the professional services market, including consulting, education, training, programming and analysis, systems operations (facilities management), and additional areas.

Federal Systems Integration Market—Forecasts the federal systems integration market by component. Analyzes agency trends towards fewer and larger procurements and the resulting impact on teaming arrangements among vendors.



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Federal Geographic Information Systems Market—Examines the growing popularity of GIS in the federal market. Discusses the leading applications and agency users, as well as leading vendors, and gives sizing and forecasting for this market.

Federal Electronic Imaging Market—Assesses the growing role this technology will play in reducing federal administrative costs and document handling, including leading federal applications, agencies, and vendors.

Federal Network Management Market—Sizes the growing market for network management products and services. Discusses the role of the federal network manager influencing this market, as well as agency WAN and LAN environments and the greater functionality being offered by the vendors.

Defense Communications Agency Information Systems Market—Examines the expanding role of DCA in fostering connectivity and interoperability of DoD IS, in light of application consolidation initiatives. Also investigates DCA functions in acquiring FTS 2000 services.

### FEDERAL MARKET BULLETINS

Uncompensated Overtime—Addresses the controversial practices of some professional services firms to bid more than 40 hours of work weekly, thus lowering hourly rates and, in many cases, improving their competitive standing.

Federal Anti-Drug Program—Identifies and analyzes the IS activities relating to federal drug interdiction and drug-abuse prevention programs, both overall and by participating agencies.

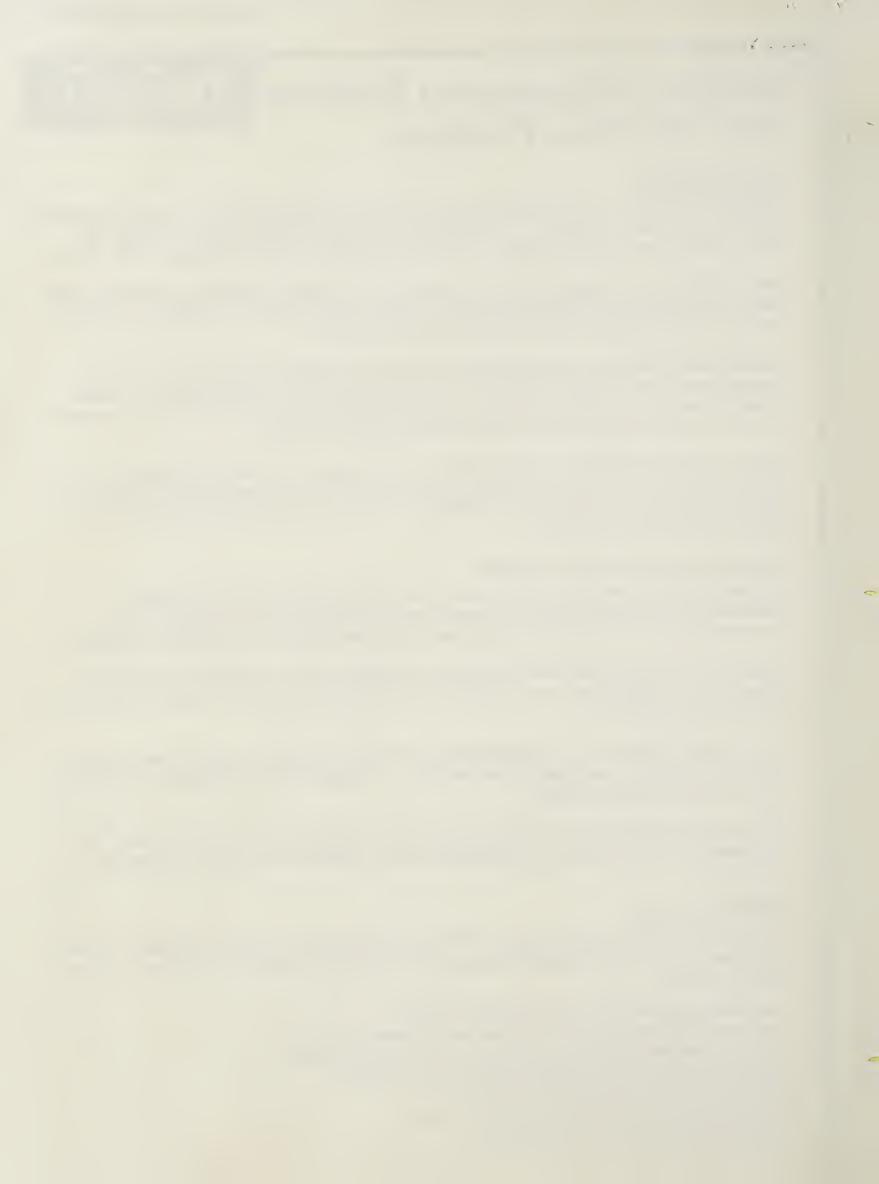
Federal 8(a) Program—Discusses the new rules relating to minority- and womanowned businesses, and their direct effects on federal IS procurements, including subcontracting relationships.

GSA Schedule Practices—Analyzes new GSA policies on dealers, schedules, cost and pricing data, as well as providing business volumes in various schedule categories.

### **BRIEF UPDATES**

As part of the 1991 subscription, INPUT will update the market analysis, forecast, and opportunity lists for the following INPUT market reports, published in either 1989 or 1990:

- Federal Electronic Data Interchange Market
- Defense Logistics Agency Information Systems Market
- Federal Processing Services/Systems Operations Market
- Federal Computer Equipment Maintenance Market
- NASA Information Systems Market
- Federal Office Information Systems Market
- Federal Computer Security Market



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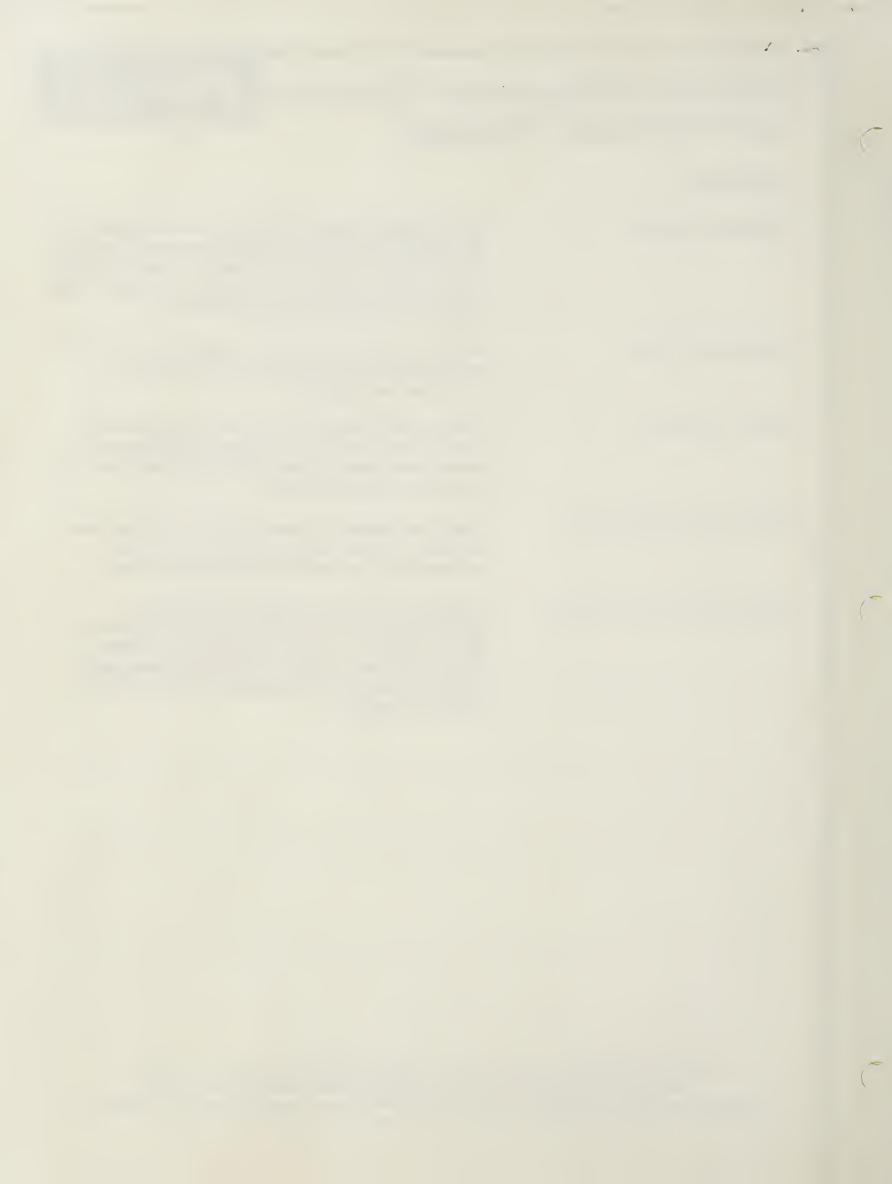
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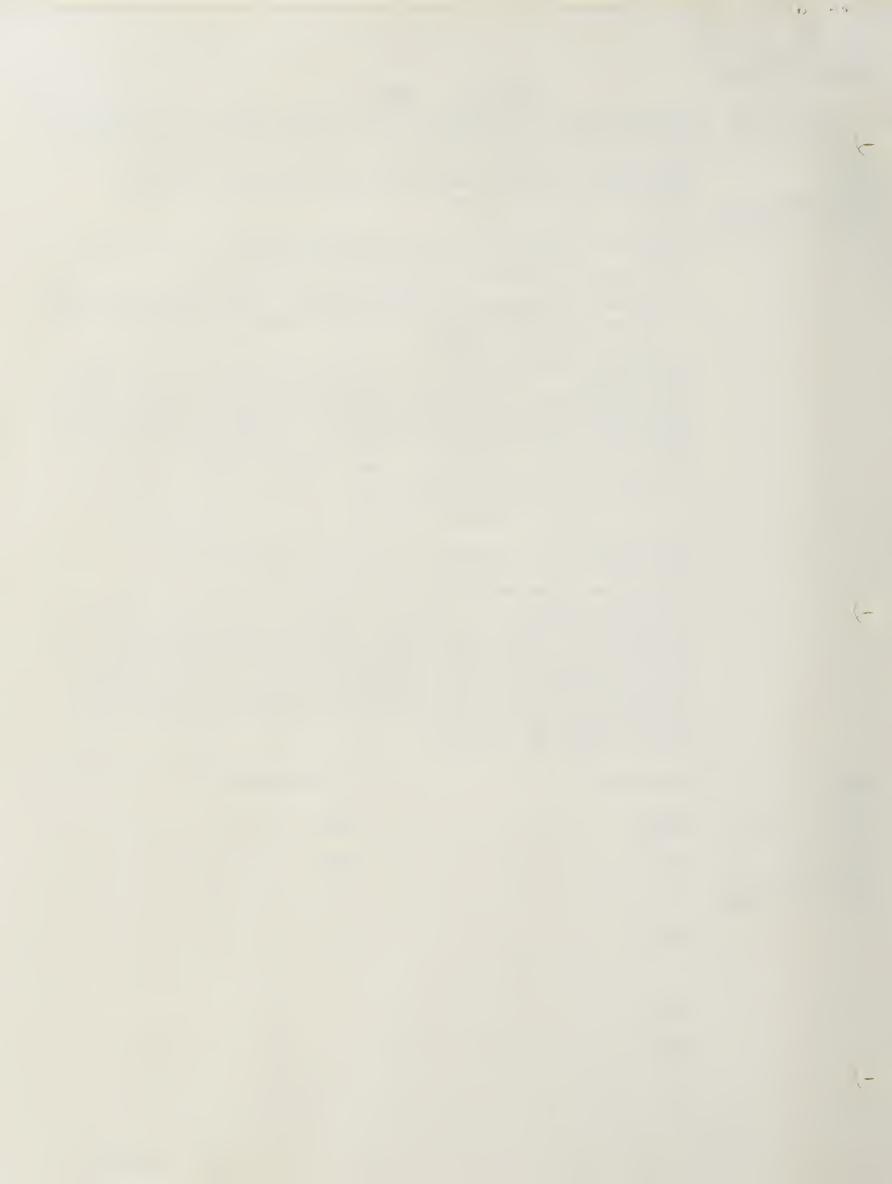
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# The Federal Electronic Imaging Market is Growing Fast . . .

### Dear Colleague:

One federal market is growing so fast and in so many different directions that it has been difficult for many analysts to pin down. The market for electronic imaging equipment and services is one of the hottest technology markets in the world right now.

And INPUT has just released a new report that ves you a unique combination of analyses informed by decades of senior experience, and comprehensive research into the details of actual procurements planned for the next five years. The report is entitled Federal Electronic Imaging Market, 1991-1996, and it offers you the kind of solid, data-based intelligence that can make all the difference.

INPUT goes deep into the documentation of agency procurements to highlight which agencies are actually planning imaging procurements, how large they are, how they plan to implement them, how they will justify them, how they will pick their vendors, and more.

Nobody else can give you this kind of intelligence, and back it up with the analysis that makes it clear where the market is moving and why. So take a look at the rest of this brochure for details on this new INPUT report. Then use the attached form to order your copy today.

Regards,

John Frank President, INPUT, INC.

### Report Highlights

### Market Analysis and Forecast

- Market Condition
- Market Pressures
- Market Forecast
  - Civilian Agency Forecast
  - Defense Agency Forecast
- Leading Vendors
- Recommendations

### Agency Issues

- Environment
- Leading Applications and Types of Systems
  - Current Imaging Applications
  - Future Imaging Applications
  - Types of Imaging Systems
- Installation Profile
  - Current Projects
  - Contract Awards
- Acquisition Plans and Preferences
  - Acquisition Plans
  - Justification and Benefit
  - Methods of Acquisition
  - Selection Criteria
  - Preference for Type of Vendor
- Standards and Legality
  - Imaging Standards

### **Key Opportunities**

- Present and Future Programs
- Federal Electronic Imaging Opportunities by Agency

# ... Find Out Exactly Why, Exactly Where, and Exactly How Much in INPUT's New Report!

The new technology of electronic imaging is providing one of the hottest federal market opportunities of the last 10 years. INPUT has just released a new report on this topic entitled Federal Electronic Imaging Market, 1991-1996. In it, INPUT provides all of the information and analysis necessary for vendors to market and sell effectively into this fast-moving market.

The report is available now.

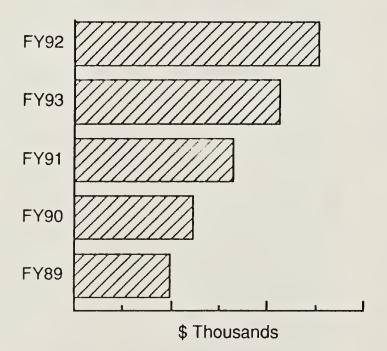
This is not speculation. INPUT's analyses and conclusions are based on comprehensive research into the federal government's own procurement plans. The OMB/GSA/NBS Five-Year Information Technology Plans for 1991 through 1996 yielded crucial insights, as did the OMB's report on its Five-Year Plan for Meeting the ADP and Telecommunications Needs

of the Federal Government. Other sources included reviews of federal agency FY90 and FY91 information technology budgets, and direct interviews with federal agencies that have active or planned imaging system acquisitions.

But for a number of reasons, not all imaging procurements show up in these documents. So to complete the picture, INPUT went through the individual procurements listed in its Procurement Analysis Reports, and added all of the imaging contracts that escaped mention in other sources.

The result is an exhaustive listing and analysis of imaging procurement activity, together with analyses of the forces—large and small—that shape this market's future.

## **Proposed Expenditures** for Imaging Technology



Source: Five-Year Plan for Meeting the ADP and Telecommunications Needs of the Federal Government

### **Tracking Rapid Change**

In a market as young and fast-changing as electronic imaging, vendors need answers to many questions about the market itself if they are to deploy their resources to exploit opportunities when they occur:

- How big is the market, and how fast will it grow over the next five years?
- Which product segments are growing fastest?
- How do civilian and defense agency imaging markets compare?
- To what extent do imaging standards exist?
- How are they affecting procurements, if at all?
- What five forces are driving the growing demand for imaging?
- What five vendors are dominating the imaging market?
- What five selection criteria are most important for agencies in this market?
- What role does a belief in paper reduction play in agency procurement decisions?
- Will the controversy over the legal status of electronic images dampen the market?

THE TRENDLINE for imaging expenditures over a fiveyear period is made obvious in INPUT's bar chart. What is not obvious is what accounts for these expenditures analysis that INPUT includes in the text of the report.



- Which applications dominate the civilian sector? The defense sector? Are they likely to change?
- Which applications are most sought after in the short term?

And a host of other questions that show you the general outlines of the federal electronic imaging market.

### **Defining Your Success**

But INPUT does not stop there. In addition to this relatively broad-brush portrait, it gives you the targeted intelligence about the specific market opportunities that ultimately define your success:

- What are the key imaging systems procurement opportunities and what are their values, by agency and PAR number?
- What is the relative proportion of agencies with and without imaging systems?
- What proportion have plans to acquire imaging systems next year? Through 1996?
- How many have done feasibility studies? Done requirements analyses? Gone to prototype?
- Which categories of imaging systems are agencies most likely to be planning to develop now?

- What percentage will develop them in house?
   What percentage will use a systems integrator?
- What imaging contracts have been awarded in the recent past—by agency, subagency, title, vendor, and dollar amount?
- What is the agency average for anticipated spending on imaging systems over the next five years?
- Which agencies are planning to acquire imaging systems over the next five years?
- Exactly how do agencies rate various cost justifications for imaging systems?
- How do they rate acquisition methods?
- · What types of vendors do they prefer?

And more of the precise, tactical information that you have to have to sell successfully to this turbulent market.

INPUT is the only company that can give you this kind of targeted tactical information, and then back it up with an analysis of market trends and forces that draws on decades of senior staff experience. Why not put this weapon in your arsenal? Use the attached form to order your copy of INPUT's report on the Federal Electronic Imaging Market, 1991-1996 today.

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### FEDERAL ELECTRONIC IMAGING MARKET

- ▲ How do civilian and defense agency markets compare?
  - ▲ Which agencies are planning procurements?
    - ▲ How will the new systems be developed?
      - ▲ Why are agencies buying these systems?
        - ▲ How do they rate imaging vendors?



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- ▲ How big is the market?
- ▲ How fast will it grow?
- ▲ What capabilities are agencies looking for?
- ▲ Exactly how do they evaluate NM products and services?
- ▲ What is the real impact of FTS 2000?

## . . . With the Hard Data and In-Depth Analysis You Can Only Get from INPUT

INPUT has just released a new report designed to give vendors a whole new marketing capability: pinpointing the best opportunities in today's tough federal network management market.

The report is based on two qualities that make it a powerful tool for making moncy in an area where the technology and the budgets are under considerable stress: the best objective market data and the most comprehensive analyses of market forces available anywhere in the world today.

The report, entitled Federal Network Management Market, 1991-1996 is available now.

Conditions in the federal network management market—with the imposition of FTS 2000, the ongoing deficit reduction debates, the pressure to reduce federal expenditures, and looming over all the proposed Government Network Management Profile—have made it extremely difficult to develop informed tactical and strategic approaches to your marketing challenges. Federal Network Management Market, 1991-1996 gives you the data and analysis you need to attack those challenges today.

### **Summary of Report Contents**

### Market Analysis and Forecast

- Market Definition and Structure
- Federal Networking
- Managing Enterprise Networks
- Market Forecast

### Federal Network Management

- Wide-Area Networks
- Local-Area Networks
- Enterprise Networks
- Federal Network Management
- · Conclusion and Recommendations

As a strategic market analysis, the report is without peer. The fundamental research protocol INPUT's analysts have designed for this market makes it possible for you to answer the important large-scale questions about federal network management:

- How big is the market for network management services?
- How fast is it growing as a whole? Which segments are leading that growth?
- How will the trend toward interconnection help drive new demand for network management?
- How are budget and deficit reduction plans affecting agencies' procurement plans?
- How can you capitalize on agencies' realization that better network services can help them reduce other expenditures?
- What is the actual conversion rate to FTS 2000, and how will that affect your ability to sell network management products and services?
- What are agencies' plans for implementing enterprise networks?
- What do agencies look for in network management suppliers?
- What proportion of agencies are expressing interest in enterprise networks, and what does that mean for your marketing efforts?
- What proportion of agencies plan to have enterprise networks within one year? Within four to five years?
- How should you react to the proposed Government Network Management Profile standard?

And many more questions that you have to answer to determine the size of the opportunity represented, and how that opportunity might change based on forces both inside and outside the market.



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### Dear Colleague:

In a market where budgets are declining, pressures to cut expenses are increasing, and demand for more network services is going through the roof, the people who succeed are going to be those who know where the opportunities are and exactly what procurement officers want from their vendors.

INPUT has just released a report entitled Federal Network Management Market, 1991-1996.

It has been researched and written to give you precisely that kind of information.

The report gives you a comprehensive analysis of this market, covering everything from the details of how many complex wide-area networking circuits various agencies have, to in-depth interviews with agency program managers who tell you exactly what kind of capabilities they have to have in their network management vendors.

This is the kind of intelligence you need to sell network management services successfully to the government. And this is the kind of intelligence INPUT's report, Federal Network Management Market, 1991-1996 gives you on every one of its pages.

Take a look at the enclosed brochure for details on this new INPUT report. Then use the enclosed form to order your copy today.

Regards,

Junes Kerrigan
Vice President

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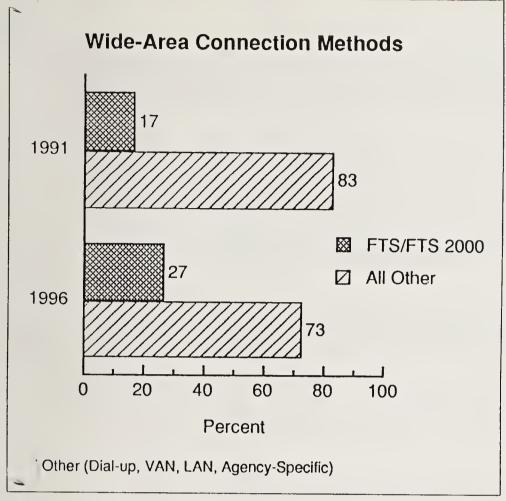
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THE COLLIDING DEMANDS for higher-bandwidth networking and for conversion to FTS 2000 are highlighted in this bar chart from *Federal Network Management Market, 1991-1996*, which shows the relative proportion of FTS and other wide-area connection methods now and in five years.

#### Specific Tactical Information

In addition to these larger strategic questions, INPUT follows its constant practice of giving vendors specific tactical information that can help them shape their shorter-term sales and marketing efforts. These are the questions that can turn around a slow quarter or lead to completely new and productive lines of business:

- Which civilian departments are the leading consumers of network management services?
- What four things do agency buyers say they need in order to implement complex integrated enterprise networks?
- What are the leading civilian departments nvolved in WANs, and how many network circuits do they have?
- What are the leading civilian departments in local-area networks?

- What percentage of their LANs are Ethernet? Token Ring? FDDI?
- What proportion of agencies have LAN-to-LAN connections today? What proportion will have them in 1996? What are the numbers for LAN-to-WAN connectivity?
- Where are the network management opportunities in EDI and E-mail?
- What are the most frequently used offthe-shelf network management packages, and why?
- What four strategies can you follow to help turn federal network management trends to your advantage?

INPUT's report on the Federal Network Management Market, 1991-1996 gives you in-depth analysis of wide-area, local-area, and enterprise networks in the federal market and of the network management services necessary to keep them up and running. It tells you what kind of services the agencies think they need, how they rate vendors, and what they think their requirements will be next year and for the next five years.

In short, it gives you the kind of research you have to have to make sense out of this market, and to make money in it.

Why not put this market intelligence to work for you right now? Use the enclosed form to order your copy today.



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INPUT's recently released report, Federal Computer Equipment Market, 1991-1996:

- Directs you to your most promising opportunities—and tells you how to take advantage of them
- Places you among your top competition with data on leading vendors, leading equipment brands, and contracts awarded
- Positions you for long-term success by discussing trends and issues affecting the market overall—and its five equipment categories—and identifying specific upcoming opportunities

# Read INPUT's New Report Today, and Succeed in the Federal Computer Equipment Market For Years to Come

#### **Report Highlights**

#### **Market Forecasts**

- Microcomputers
- Workstations
- Midsized Systems
- · Large-Scale Systems
- Supercomputers

#### Market Analysis

- Civilian Market
- Defense Market
- Leading Vendors

#### Federal User Requirements and Trends

- Processing Role: Standalone versus Interconnected
- Current and Future Applications Areas
- Downsizing of Applications
- Impact of Governmental Policies and Regulations
- Acquisition Plans and Preferences
- Industry and Technology Trends

#### Competitive Trends

- Installation Profile by Brand
- Sales Profiles by Vendor

#### **Key Opportunities**

- Present and Future Programs
- Federal Computer Equipment Opportunities by Agency

Federal Computer Equipment Market, 1991-1996, INPUT's new report, is a response to our clients' requests for a detailed assessment of the federal computer hardware market.

It will direct you to the market opportunities that are most promising for your company, and it will help you take full advantage of these opportunities. It gives you the market data and analysis you need to develop viable marketing strategies. And it will help you position yourself against your leading competition.

And that's good news, because while the federal computer equipment market is forecast to grow steadily through 1996, growth in this market is slowing. And competition is heating up. Federal Computer Equipment Market, 1991-1996 gives you the solid market intelligence you need to target the best opportunities and succeed.

#### Market Trends and Issues

What are the trends and issues impacting the federal computer equipment market? And how can they translate into opportunity for your company? Federal Computer Equipment Market, 1991-1996, analyzes the federal market for five sizes of computer equipment—microcomputers, workstations, midsized systems, large-scale systems, and supercomputers—and discusses in-depth the trends that will have significant impact on how you market your products through 1996 and beyond:

- How will the trend towards application downsizing affect each of the five equipment categories?
- How far-reaching are the trends towards compatibility, interoperability, and open systems?
- What are the inventories of each equipment category for the federal agencies, and how are expenditures for this equipment likely to change through 1996?
- What are currently the primary applications ( that run on each category of equipment? What will they be in the future?



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#### Dear Colleague:

The federal computer equipment market is expected to grow steadily over the next five years, and it will continue to offer vendors like you solid opportunities: Computers have become necessary in most federal agencies to perform a wide range of functions. And most government programs require constant improvement in the quality and quantity of their information technology.

Federal Computer Equipment Market, 1991-1996, a new report from INPUT, examines this market in-depth. It outlines the opportunities available and explains how to make the most of them so you can drive your business through the 1990s successfully.

This report will help you focus your marketing activities because it assesses, on an individual basis, the markets for five equipment categories: microcomputers, workstations, midsized systems, large-scale systems, and supercomputers. It discusses the trends and issues that affect these markets and how you must operate in them to stay competitive.

INPUT's discussion of computer acquisition methods, agencies' equipment selection criteria, and top agencies' installation profiles will further allow you to pinpoint the best opportunities for your company and formulate viable marketing strategies. Identification of leading vendors, including the value of their contracts, will allow you to place yourself among your top competition.

Participating in a federal market can be difficult, and competition can be tough. But the right market information can help ensure your success. *Federal Computer Equipment Market*, 1991-1996 gives you that information. Please order your copy today.

Sincerely yours,

John & Trank

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## Agency Acquisition Plans and Preferences

input's assessment of agencies' acquisition practices gives you the specific knowledge you need to target your sales activities most effectively. Federal Computer Equipment Market, 1991-1996 tells you:

- Agencies' planned equipment acquisitions, by system size, over the next three to five years.
   What size of equipment is receiving the largest percentage of agency budgets?
- Agencies' preferred methods of acquisition. How do their preferences for RFPs, requirements contracts, GSA schedules, etc. compare?
- What selection criteria do agencies use when buying equipment?

#### **Leading Vendors**

Federal Computer Equipment Market, 1991-1996 provides you with comprehensive data on the leading vendors in this market so you can understand your competition—their strategies, rengths, and weaknesses—and position yourself among the top vendors.

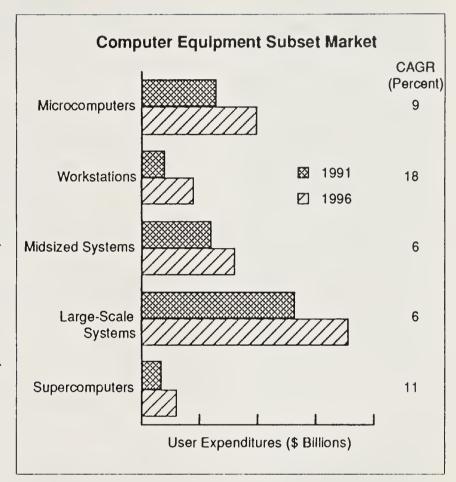
Among a variety of data, you'll learn who the top vendors are (and what the top brands are), for ADP, office information systems, and telecommunications equipment. And you'll learn the total dollar amount of contracts they were awarded in FY 1988 to FY 1990. You'll get invaluable insight into their marketing and sales strategies so even in times of rough competition, you can stay on top.

#### **Opportunities for Competitive Edge**

The federal computer equipment market is facing the impacts of significant and far-reaching trends. And it is becoming increasingly competitive. Federal Computer Equipment Market, 1991-1996 tells you how to adapt to these trends—and overcome the competition—through expert market analysis backed by INPUT's comprehensive research.

Give yourself a competitive edge. And rely on NPUT's industry expertise. Order Federal omputer Equipment Market, 1991-1996 today.





According to INPUT's research, the federal computer equipment market is forecast to grow at a compound annual rate of 8% through 1996. However, each category of equipment is affected by different acquisition trends and therefore may grow faster or slower than the overall market.

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# The Federal Geographic Information Systems Market Offers Tremendous Growth Potential

- Learn about upcoming procurements
- Discover how and where to focus your product marketing activities
- Understand the issues that will impact the market through 1996
- Learn about key vendors

...with INPUT's report,

Federal Geographic Information

Systems, 1991-1996

# Increase Your Growth Potential With INPUT's New Report

There are few markets that offer as much opportunity as the federal geographic information systems (GIS) market. Among a variety of market segments INPUT tracks, where growth rates rarely exceed 10%, the federal GIS market is expected to grow at a compound annual rate of 22%.

#### Report Highlights

#### Overview

- GIS Definition
- Federal Market Pressures
- Vendor Selection Criteria

### Market Analysis and Forecast

- Civilian Agency Forecast
- Defense Agency Forecast
- Software Vendors
- Hardware Vendors
- Leading Professional Services/SI Vendors
- Recommendations

#### Agency Issues

- Existing Federal GIS Applications
- OMB Circular A-16
- Involvement of State/ Local Governments
- Standards

### Key Awards and Opportunities

- Recent Awards
- Upcoming Opportunities

In a survey of 110 agencies, 95 reported that they are using or plan to use GIS. Twenty-nine of these agencies identified projects exceeding \$1 million.

You can take advantage of this tremendous opportunity with INPUT's new report. Federal Geographic Information Systems, 1991-1996 gives you a concise analysis of the current status and future trends of the federal GIS market. It tells you not only where to find the most promising opportunities, but how to benefit from them.

Order within the next 30 days and save \$100 off the regular list price for the report!

### Issues in a Growing Market

INPUT's research—based on extensive research that included surveys of agency officials, analyses of planned federal procurements involving GIS, and analyses of federal guidelines and directives involving GIS revealed important insights into the issues that define the federal GIS market and that will drive and hinder its growth over the next five years. INPUT's expert assessment of these issues will help you focus your efforts in this dynamic market by answering such questions as:

- How has the centralized movement towards standards affected the market?
- How are some agencies applying new technologies to implement GIS?
- What is the scope of OMB's Circular A-16, and how has its revision driven the market? Specifically, what are the new responsibilities of various federal departments?
- How has increased state and local government use of GIS accelerated federal interest in GIS?
- What are the major federal GIS applications?
- How have agency budget constraints restricted the market?

#### Focus Your Marketing

In addition to discussing the broad-based issues defining the GIS market, Federal Geographic Informations Systems Market, 1991-1996 focuses on specific user issues and vendor recommendations that will help you formulate viable product marketing and sales strategies to increase your market penetration:

- What are the prominent hardware and software platforms used to run GIS applications?
- How do federal agencies rate methods for acquiring GIS?



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#### Dear Colleague:

The tremendous growth potential of the federal geographic information systems market offers exciting opportunities for vendors. In a survey of 110 federal agencies, 95 reported that they are using or plan to use GIS. Twenty-nine of these agencies have projects exceeding \$1 million.

INPUT's new report, Federal Geographic Information Systems, 1991-1996, outlines these opportunities in depth and explains how you can make the most of them.

Based on extensive research that included interviews with federal agency officials and analyses of planned federal procurements involving GIS, Federal Geographic Information Systems 1991-1996 provides the most complete assessment of this market available. This report not only reveals where the opportunities are now and where they are likely to arise, but also how significant market issues and trends are affecting the way vendors must operate in this market to stay competitive.

INPUT's expert analysis of federal market pressures and vendor selection criteria, and discussion of leading vendors will provide you with the background necessary to support and guide your marketing strategies.

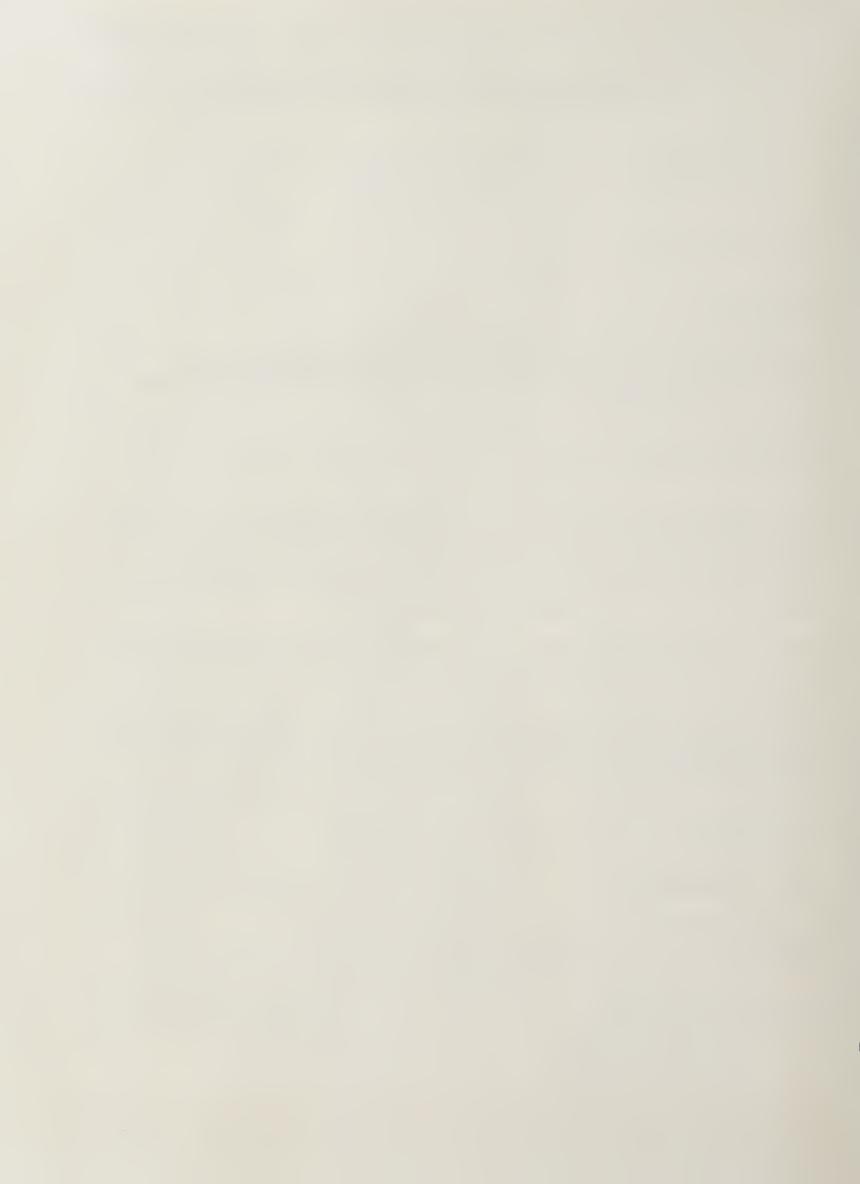
Participating successfully in a growing market—such as federal GIS— can be difficult without the right information. INPUT gives it to you in the new report Federal Geographic Information Systems 1991-1996. Please order your copy today.

Sincerely yours,

John E Trank

John Frank President

INPUT, INC.



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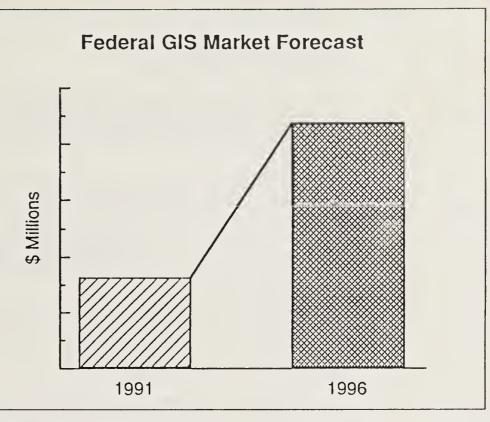
- What criteria are most important to users when choosing a GIS?
- How can alliances strengthen your market presence?

In addition, Federal Geographic Information Systems Market, 1991-1996 highlights key awards and upcoming procurements so you know specifically where your opportunities are.

#### **Competitive Edge**

To support its analysis of the forces driving the federal GIS market, INPUT's report gives you accurate, five-year market forecasts in graphic format, showing you which aspects of the market are growing fastest. In addition, you will learn about the key vendors in the market, the projects in which they are involved, and their product strategies. In a market where there are no dominant vendors, this is the kind of information you can use to gain significant competitive edge. You will learn:

- How fast the civilian and defense sectors of the market are growing, and what factors are driving that growth
- How fast the software products, professional services, and computer equipment markets are growing within these sectors
- Prominent software, hardware, and professional services vendors and the GIS projects in which they are involved



See where the most promising market opportunities are in INPUT's analysis of the federal GIS market, including the most current market data available—presented for the industry as a whole, and for computer equipment, software products, and professional services.

The federal GIS market has no dominant vendors, so there's no better time to take advantage of its tremendous growth. Interest in GIS is increasing, new technologies are broadening the types of implementations possible, and regulatory changes are promoting growth at the state/ local government level and consequently, at the federal level. This market is progressing, and with the right information, you can progress with it.

INPUT gives you that information.

Federal Geographic Information Systems Market, 1991-1996 is essential reading—packed with the expert market analysis, forecasts, and recommendations you need to succeed in this market. Use the enclosed form to order your copy today.

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**New From INPUT:** 

# The Federal Anti-Drug Program report

Information technology vendors use this report to

- Plan marketing strategies to compete for Drug War information technology contracts
  - Understand the market potential for information technology to help fight the Drug War
    - Learn ways to improve opportunities in this market
      - Discover which Drug Control Program agencies are spending for information technology, and which technologies they are buying

Drug Control Program agencies involved in intelligence, interdiction, communications, and surveillance operations will special approximately 12% of their drug control budgets on information technologies in FY 1991 and FY 1992.

Information technology is a significant weapon for fighting the drug war: It is used to track and identify drug-trafficking patterns, to accelerate the processing of information to enhance the effectiveness of interdiction efforts, and to facilitate the exchange of critical data.

#### Table of Contents

#### Market Analysis

- Agency Estimates for Information Technology, FY 1991 and FY 1992
- Agency Budget Requests
- Market Forces
- Information Technology Opportunities

#### Agency IT Roles in the Federal Anti-Drug Program

- DoD
- Office of National Drug Control Policy (ONDCP)
- Drug Enforcement Administration
- Federal Bureau of Investigation
- Immigration and Naturalization Service
- U.S. Secret Service
- · U.S. Customs Service
- FinCEN
- U.S. Coast Guard

These are some of the key conclusions of a new report published by INPUT, *Federal Anti-Drug Program*. This comprehensive report

- Provides an overview of the Federal Anti-Drug Program
- Examines the issues and factors influencing the market potential for information technology in support of drug control program activities
- Discusses the role information technology will have in the drug war
- Provides critical information about market forces and agency expenditures to help vendors plan their marketing strategies to compete for drug war information technology contracts

#### **Market Forces and Issues**

The Administration considers the drug war a national priority and expects to increase political pressure aimed at achieving a drug-free America by 1995. Information technology will play a significant role in achieving this goal, but vendors will have to understand, and overcome, several market issues for this to happen. Federal Anti-Drug Program discusses these issues, clarifying

- Which forces are driving and inhibiting the use of information technology to fight the drug war—INPUT's report explains how Congressional inaction, presidential pressure, and agencies' need for system upgrades among a variety of other forces—are impacting the market.
- What role alliances will play for vendors intent on entering this market—How can vendors form alliances with those already active in this market, and what are the benefits of such relationships?

#### **ORDER FORM**

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I need INPUT's report, Federal Anti-Drug Program.

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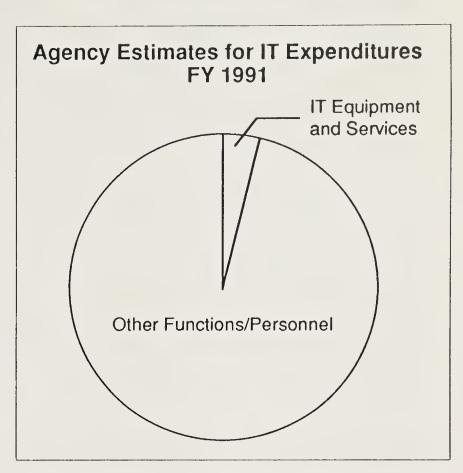
- How security issues affect vendors' ability to enter this market—Intense security surrounds systems that contain sensitive data, making agencies reluctant to conduct open competition for bids. How can vendors overcome this barrier?
- What steps vendors can take to improve their opportunities in this market—INPUT's report suggests steps vendors can take to overcome a variety of roadblocks in this market, including the problem of interagency data sharing.

## Information to Target Your Marketing

In addition to discussing general market issues, NPUT's report provides the specific information you need now to target your marketing activities effectively:

- Which Drug Control Program agencies are spending for information technology, and which information technologies are they buying?
- Which agencies are spending the most money for information technology?
- According to the National Drug Control Strategy, what are the top-priority information technology-related initiatives for federal agencies for the 1992-1994 period?
- What are the information technology budgets for FY 1991 and FY 1992 for the various Drug Control Program agencies?

Operating in any federal market or program can be difficult, and the Federal Anti-Drug Program is no different. But INPUT's research—which included a comprehensive review of governmental information technology udgets—suggests that the Anti-Drug Program offers healthy opportunity for information services vendors.



INPUT's RESEARCH SHOWS that agency expenditures for IT equipment and services currently account for roughly 12% of the total Drug Control Program budget. However, IT initiatives will have to be given more congressional priority if the anti-drug strategy is to be effective by 1995, as planned.

Make the most of this opportunity. Order INPUT's Federal Anti-Drug Program report and learn how to focus your marketing strategies to compete successfully for information technology contracts.

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If You Need
Specific Intelligence
on
Opportunities in the
Federal Computer
Equipment
Maintenance
Market...

- What are specific agencies' procurement plans through 1995?
  - How do buyers evaluate maintenance vendors?
    - How big is the market, and how fast is it growing?
      - What are successful competitors doing?

# ... You Need the Latest Report from INPUT!

INPUT has released a new report entitled *Federal Equipment Maintenance Market*, 1990-1995 that identifies and analyzes hundreds of millions of dollars worth of federal computer equipment maintenance contracts through GFY 1995.

And if you act before January 25, 1991, you'll pay \$175 less than the regular list price for the report—a savings of 10 percent!

#### Federal Equipment Maintenance Market, 1990-1995

#### Market Analysis and Forecast

- Current Market Conditions
- Market Structure
- Market Forecast
- Federal Market Issues
- Competitive Environment
- Leading Agencies

#### Federal User Requirements and Trends

- Agency Hardware Environment
- · Performance Requirements
- · Agency Acquisition Plans and Preferences
- Agency Satisfaction with Vendor Performance
- Trends

#### Competitive Trends

- Vendor Participation
- Vendor Perceptions
- · Discounting and Alliance Practices
- · Maintenance Contractor Selection Criteria
- Trends

#### **Key Opportunities**

- Present and Future Programs
- Equipment Maintenance Opportunities by Agency

If pinpointing procurements was all it did, this report would be well worth such a moderate price. After all, you have to have this intelligence if you are going to know where to deploy your sales, marketing, and engineering resources to make the most of these multimillion-dollar opportunities.

But INPUT does more than just flag pending procurements.

#### **Answers**

The report puts this specific information in the context of both the larger forces shaping the market, and the tactical considerations you cannot afford to ignore. Its purpose is to give you answers to all of the major questions you have to address, including:

- To buyers selecting maintenance providers, what is the relative importance of performance and contract cost?
- How do buyers weight other factors in their decisions, such as reputation, cost control procedures, proposed technical solution, and contract type?
- How big is the equipment maintenance market, and which segments are growing fastest?
- How can you shape your business to turn budget constraints, computer obsolescence, the new emphasis on competition, multivendor installations, and widespread microcomputer penetration to your advantage?
- Who are the leading vendors in federal equipment maintenance, and what strategies are they pursuing?

And other information that lets you shape effective strategies for exploiting all kinds of equipment maintenance opportunities for the next five years.

#### A Competitive Edge

In addition to this large-scale analysis, INPUT's report concentrates on providing specifics on pending procurements together with information on agency practices and competitive trends. And that gives you an edge on companies without access to this kind of in-depth, informed analysis. The report answers questions about:

- Which agencies have obligated the largest expenditures to equipment maintenance over the last two years?
- What is the total number and dollar value of large and midsize systems installed at federal agencies?
- What is the average age of the installed base, by agency?
- What percentage of federal users employ third-party maintenance organizations?
   OEMs? In-house maintenance services?
- What are the present satisfaction levels of agencies with their maintenance services?
   What areas do they say need improvement?

And 86 specific agency procurement opportunities, including PAR reference, RFP schedule, and funding for GFY 1990-1995, where known.

INPUT is able to provide some of this information to you through a careful analysis of the OMB/GSA Five-Year Plan submitted in compliance with OMB Circular A-11, budget requests, and other documents. But we have also tapped sources for information not available to the general public, including the Five-Year Defense Plan and supporting documentation.



INPUT IDENTIFIES THE LEADING AGENCIES for purchase of equipment maintenance products and services. This is only one kind of market research available in the report, which includes market analysis and forecast, competitive trends, key opportunities, and user requirement data.

The result is a distillation of millions of words of federal procurement verbiage into a single, clear, and concise volume that pintpoints opportunities and offers a means of exploiting them. This is a powerful competitive weapon in a market where having the right information at the right time can make all the difference.

So use the enclosed order form to get your copy of Federal Equipment Maintenance Market, 1990-1995 today.



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# If You Need an Edge in the Federal Financial Systems Market...

- ♦ Where are the major active procurements right now?
- ♦ Where are the financial systems growth areas?
- ♦ Will Reform 88 ever affect you?
- ♦ What are the impacts of the JFMIP?
- ♦ Who are the dominant competitors, and what are they doing?

# ...INPUT Can Show You Exactly Where the Opportunities Are!

The federal financial systems market is one of the government markets with the highest potential for explosive growth.

And INPUT has just published a new report titled *Federal Financial Systems Market*, 1990-1995, designed to give you the competitive advantage that comes with targeted intelligence on agency requirements, legislative impacts, and where the major procurement opportunities are.

At full price, it is an exceptionally cost-effective way to concentrate your resources on only the best available opportunities.

And if you act before November 5, you'll pay \$95 less than the regular list price for the report—a savings of 10 percent!

The report contains two kinds of information that you cannot find anywhere else in such a

#### Federal Financial Systems Market, 1990-1995

#### Market Analysis and Forecast

- JFMIP Background
- Financial System Standardization Measures
- Agency Awareness of Regulations
- Impediments to Vendors
- Budget Constraints and Software Procurement alternatives
- Procurement Opportunities
- Market Forecast
- Conclusions and Recommendations

#### Competitive Considerations

- Current Software Vendors
- Future Software Vendors
- Impact on Hardware Vendors

#### Key Opportunities

Financial Systems Opportunities by Agency

concentrated form. The first is in-depth analysis of this market, including all the factors now working to enhance its growth.

And the second is specific, tactical information on what the procurement plans of the major agencies are, how big they are, when the RFPs are due, and what the selection criteria are likely to be.

The kinds of tactical questions covered in the report include:

- Which seven federal agencies represent the hottest current opportunities for financial software vendors, either at the RFI or RFP level?
- What criteria are used to evaluate financial system vendors, and how do they differ from agency to agency?
- How important are custom programming service agencies needing financial systems?
- What strategies have Computer Data Systems
   Incorporated and KPMG Peat Marwick used to sell
   in the federal market? Why have they been
   successful where others have failed?
- Which firms not currently on the GSA schedule may become significant competitors in the future, and why?
- How can strategic alliances help you penetrate the financial systems market?

And other questions concerning the types and sizes of opportunities for financial systems procurements by agency.

#### The Highest Possible Returns

As you know, the laws of supply and demand sometimes do not have the most influence on which agencies buy which financial systems in the federal market.

Other forces, including attempts at standardization, agency requirements, legislative initiatives of one kind or another, attempts at reformand the constriction of federal budgets sometimes predominate.



Federal Financial Systems Market, 1990-1995 analyzes these forces in detail, bringing to bear INPUT's tremendous research resources and our staff's decades of experience in the federal maze on such questions as:

- How big is the market for federal financial systems, and how fast is it growing?
- Which delivery modes (professional services, software, and computer equipment) represent the best growth opportunities?
- Which procurement mode do most agencies use for obtaining core-compliant software?
- How can you use the Joint Financial Management Improvement Program (JFMIP) to help you penetrate this market?
- How big is the market for federal financial systems? How fast is it growing? Which category (professional services, software, equipment) is growing fastest?
- How have GAO audit targets affected the market for financial systems?
- How will the Financial Integrity Act of 1982, Reform 88, OMB Circular A-127, and GAO Title 2 affect your selling in these markets?
- How are some agencies getting around the requirements for core-compliant financial software?

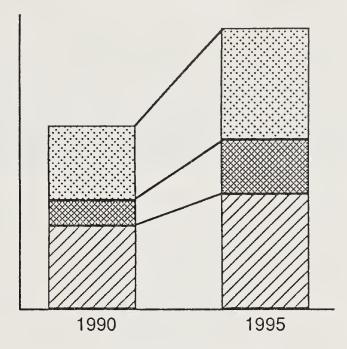
INPUT goes into all of these subjects—and many others—in depth, so that you can understand how the larger market forces are affecting financial systems procurements, and can concentrate your sales and marketing resources where they will yield the highest possible returns.

#### Concentrated Intelligence

The information in this study represents months of research, including interviews with key agency procurement officers and an exhaustive search and analysis of vast numbers of federal documents related to financial systems procurement. And all of it—surveys, interviews, search, and analysis—have been tempered by our unmatched experience in uncovering opportunities in one of the most complex markets in the world.

The result is five chapters of concentrated intelligence that can help you target the best procurements—intelligence that would be impossible for you to duplicate on your own.





- Professional Services
- Software Products
- ☑ Computer Equipment

SIZE AND GROWTH RATE DATA for three key segments of the Federal financial systems market are shown in this graph, which is typical of the kind of information contained in the INPUT report.

But you don't have to. Because to get the same results—to get all of the benefits of one of the most sophisticated research efforts ever conducted in the federal market—all you have to do is ask.

So use the enclosed order form to ask for your copy of *Federal Financial Systems*, 1990-1995 today.

# Call, fax, or mail your order to INPUT

to any office listed on the back of this brochure

### **About INPUT**

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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# If You Need Reliable Intelligence about the Federal Professional Services Market...

- ♦ How big is the market?
- How fast are various segments growing?
- ♦ What are agencies looking for in vendors?
- ♦ Which agencies spend the most in this market?
- Which RFP opportunities are open right now?

# ...You Need the Concentrated Research in INPUT's New Report!

You need information you can trust about federal professional services. And INPUT has just released a new report designed to give it to you.

The Federal Professional Services Market, 1990-1995, is a report that contains a distillation of extensive research into this rapidly changing market. Written by an expert staff with several decades of experience in the federal markets, the report combines their expertise with the results of INPUT's formidable research infrastructure to give you a targeted competitive weapon you can use to boost sales now.

#### Federal Professional Services Market, 1990-1995

#### Market Analysis and Forecast

- Overview
- Market Forecast, 1990-1995
- Vendors of Professional Services to the Government
- Market Size by Agency
- Federal Market Issues

#### Federal User Requirements and Trends

- Significant Problems/Issues
- Budget and Applications
- Agency Perceptions of Professional Services
- Case Studies of Professional Services Contracts
- Acquisition Plans and Preferences
- Projected Trends in the Use of Professional Services

#### Competitive Trends

- Vendor Participation
- Vendor Market Perceptions
- Vendor Contracting Views
- Trends
- Recommendations

#### Opportunities

- Future Programs
- Professional Services Opportunities by Agency

At the full price of \$1,750, this comprehensive study would be a bargain.

But if you act before February 28, 1991, you'll pay \$175 less than that regular list price for the report—a savings of 10 percent!

The market is changing fast. Slower growth, budget constraints, and increased competition are all acting to transform the way you'll have to do business. INPUT's report can help you turn these changes to your advantage.

#### **Answers**

The first advantage the report gives you is a penetrating analysis of the broad-scale trends sweeping this market. It was written to help you answer questions like:

- What are the professional services budgets of the top civilian and military agencies for 1990 and 1991?
- What proportion of the federal professional services market is accounted for by GOCO? By consulting services? By education and training? By software development?
- What forces are driving the growth of the GOCO market?
- How are budget constraints and dissatisfaction with contracting out various services affecting the consulting services market?
- How is the growth of commercial systems operations affecting the federal education and training market?
- How will POSIX and GOSIP change your business?
- What's happening behind the MASCs?
- What impact has slower federal budget growth had on competition?

The report also offers detailed analyses of the competitive environment you have to work in every day. Who are the top 20 vendors? What are their histories in the market? What contracts were recently awarded them? What strategies are they pursuing? The report addresses all of these issues, and more.

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# Dear Colleague:

To get the greatest benefit from the money and energy you spend on federal professional services bids, you need targeted market intelligence on where the opportunities are, what the agencies require from you, and who your competition is likely to be.

INPUT's new report on the Federal Professional Services Market, 1990-1995 is a distillation of extensive research into this fast-changing opportunity.

The report was compiled by people who have spent their entire professional careers reading federal markets, either as agency buyers or commercial vendors, or both. They have written a report that gives you:

- Detailed market forecasts
- In-depth vendor profiles
- Investigations of broad market trends
- Analyses of agency expenditures
- Analyses of agency vendor requirements
- An examination of competitive trends
- An analysis of 76 open RFPs

And much more.

Why settle for guesswork in a market this complex? INPUT has already done the work to answer your key questions.

So read the enclosed brochure, then use the order form to pick up your copy of the report today!

Regards,

John Frank

President, INPUT, INC.

der E Trank



# **ORDER FORM**

ES! I need a competitive advantage in the federal professional services market. I need INPUT's report, Federal Professional Services Market, 1990-1995. I understand that I may call my order in, fax it to you at the number below, or send this form by mail. I understand that I must supply the relevant information for all three of the following sections. **SECTION ONE:** Send me \_\_\_\_\_ copy (copies) of INPUT's report, Federal MY ORDER Professional Services Market, 1990-1995 at the fee of \$1,750 each. SECTION TWO: ☐ Enclosed is my check for \$ \_\_\_\_\_\_ to cover the cost of my order. TERMS OF PAYMENT (CHOOSE ONE) ☐ Charge \$\_\_\_ \_\_\_\_\_ to my American Express card: Card # Exp. date Name as it appears on my card ☐ Please invoice my company for \$ \_\_\_\_\_\_ on purchase order number California clients: Please add applicable sales tax on 70% of purchase price. Connecticut clients: Please add 8% sales tax on the total amount. SECTION THREE: Authorized By: Accepted By INPUT: **AUTHORIZATION** Organization Signature Name Name Title Title INPUT Date Address 1280 Villa Street

Date

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The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.



# A Tactical Advantage

But in addition to this kind of information and analysis of large-scale trends, INPUT's report also offers you focused answers to the tactical questions that can have a tremendous short-term impact on your sales:

- What are 76 actual professional services opportunities that are open now, and what are their RFP schedules and funding levels?
- How have PCs created new professional services markets?
- Where will OMB Circular A-76 have the greatest market impact, and how can you respond?
- Which four agencies spend the most in each of the following four categories of professional services: software development, consulting services, education and training, and systems operations?
- How do key buying agencies rank the importance of eight major categories of vendor expertise?
- How do these agencies rank the disadvantages and liabilities of using professional services?
- How do defense and civilian agencies rank seven key characteristics of successful contractors?
- How do buying agencies rank five vendor selection criteria, including cost, staff experience, proposed technical solution, reputation, and project management capabilities?
- What kind of professional services contracts do various federal agencies prefer?
- What improvements do civil and defense agencies want to see in professional services vendors?

# Federal Government Agency Professional Services Budgets, GFY 1990-1991

|   | \$ Millions |                             |       |       |        |           |
|---|-------------|-----------------------------|-------|-------|--------|-----------|
| Consulting,<br>Education, and<br>Training |             | and Software Operations and |       |       | Agency |           |
| 1990E                                     | 1991F       | 1990E                       | 1991F | 1990E | 1991F  |           |
| 75  | 80          | 301                         | 320   | 255   | 283    | Energy .  |
| 347                                       | 239         | 334                         | 404   | 66    | 71     | GSA       |
| 53  | 51          | 440                         | 510   | 421   | 475    | NASA      |
| 14  | 7           | 424                         | 392   | 414   | 442    | Air Force |
| 47  | 40          | 429                         | 461   | 108   | 114    | Navy      |
| 47  | 48          | 259                         | 323   | 571   | 628    | Army      |

E = estimated F = forecast

Plus four in-depth case studies of large professional services contracts, including: mission; tasks performed; type, value, and duration of contract; schedule; prime and subs; project components; value of each component; project scope; and original funding.

You could not possibly duplicate this research effort for any reasonable cost. But by buying the report, you can effectively put the entire project staff on your team, and put INPUT's expertise to work for you right now, giving you the edge you need in this market.

Why wait? Use the enclosed form to order your copy of INPUT's report on the *Federal Professional Services Market*, 1990-1995 today.

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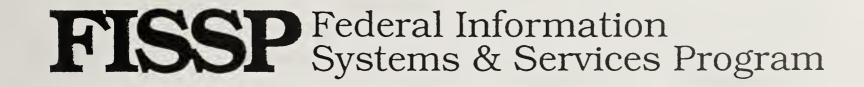
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# Procurement Analysis Reports

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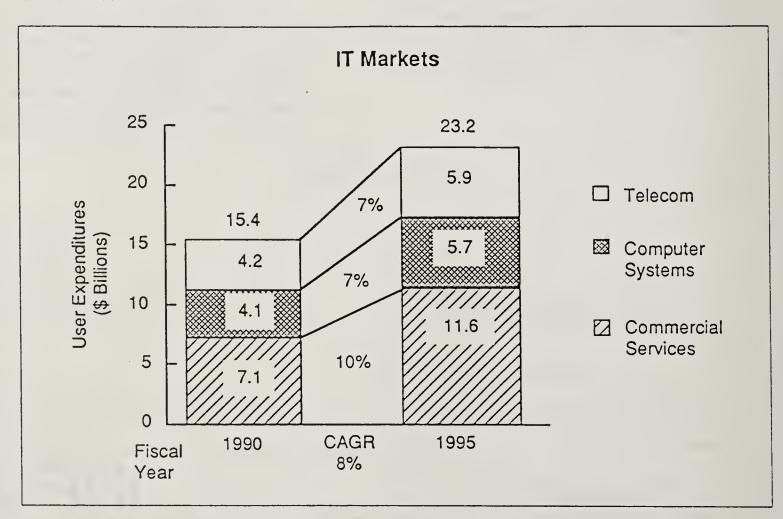
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# Market Forecast by Service Modes

# 1. Federal IT Market

INPUT dissociates the federal IT budget elements and recombines them into more convenient industry terms. The first reassembly provides a perspective of that portion of the budget that would be spent on contracts for goods and services, as illustrated in Exhibit III-11. In the remainder of this subsection, INPUT provides forecasts and discussion of the individual delivery modes defined in Appendix B.

## EXHIBIT III-11



# INPUT PAR INDEX BY AGENCY

| AGENCY    | PROGRAM                                  | PAR<br>NUMBER |
|-----------|--|---------------|
|           |  |               |
| AIR FORCE |  |               |
| AFDSDC    | COMMAND BUDGET AUTOMATED SYSTEM          | V-1-21        |
| AFAL      | DATA SERVICES CONTRACT FOR AFAL          | V-1-22        |
| ESD       | AIR FORCE WWMCCS ADP MODERNIZATION       | V-1-27        |
|           | SYSTEM ENGINEERING SUPPORT FOR NORAD COM | V-1-30        |
| AFLC      | JOINT UNIFORM SERVICES TECHNICAL INFORMA | V-1-53        |
| MAC       | ADVANCED COMPUTER FLIGHT PLAN            | V-1-93        |
| ESD       | SPECIAL OPERATIONS FORCES PLANNING ANW R | V-1-105       |
| AFSC      | AIR FORCE CALS                           | V-1-108       |
| HQ        | ENHANCED SORTS CAPABILITY ASSESSMENT MOD | V-1-112       |
| ESD       | WIS WORKSTATIONS AND ASSOCIATED PERIPHER | V-1-115       |
| ESD       | SURVIVABLE BASE RECOVERY AFTER ATTACK CO | V-1-120       |
| SSC       | STANDARD SOFTWARE REQUIREMENTS CONTRACTS | V-1-121       |
| ESD       | AIR FORCE AUTOMATED MISSION PLANNING SYS | V-1-123       |
| AFCAC     | AUTOMATED RECORDS MANAGEMENT SYSTEM      | V-1-124       |
| AFCAC     | OPERATIONAL LOCATION A DATABASE          | V-1-125       |
| ESD       | JOINT STAFF AUTOMATION FOR THE NINETIES  | V-1-126       |
| LIS       | DEFENSE EMERGENCY AUTHORITIES RETRIEVAL  | V-1-127       |
| AFCAC     | NAVY SUPERMINI COMPUTERS                 | V-1-128       |
| AFCAC     | DATABASE MACHINES                        | V-1-129       |
| ESD       | WWMCCS FOLLOW-ON MAINTENANCE CONTRACT    | V-1-130       |

# INPUT PAR PROGRAMS BY RFP DATE RFP RELEASE EXPECTED DURING 1991 REPORT DATE - FEBRUARY 7, 1991

PAR AGENCY PROGRAM NUMBER AIR FORCE AFAL DATA SERVICES CONTRACT FOR AFAL V-1-22 SYSTEM ENGINEERING SUPPORT FOR NORAD COM V-1-30 AFLC JOINT UNIFORM SERVICES TECHNICAL INFORMA V-1-53 HO ENHANCED SORTS CAPABILITY ASSESSMENT MOD V-1-112 ESD SURVIVABLE BASE RECOVERY AFTER ATTACK CO V-1-120 SSC STANDARD SOFTWARE REQUIREMENTS CONTRACTS V-1-121 AFCAC AUTOMATED RECORDS MANAGEMENT SYSTEM V-1-124 AFCAC NAVY SUPERMINI COMPUTERS V-1-128 AFCAC DATABASE MACHINES V-1-129 ESD WWMCCS FOLLOW-ON MAINTENANCE CONTRACT V-1-130 WSMC LAUNCH SUPPORT SERVICES CONTRACT V-1-133 CONTINUOUS ENGINEERING AND TECHNICAL SER V-1-134 AFWL OPERATIONS AND MAINTENANCE OF THE AIRFOR V-1-135 WSMC OPERATIONS AND MAINTENANCE OF WESTERN SP V-1-136 SETA FOR FLIGHT TEST CENTER V-1-137 AFHRD DESKTOP TRAINING FOR LOGISTICS COMMAND A V-1-140 TEMPEST II V-1-142 DATA ACQUISITION SYSTEM V-1-143SSC INTEGRATED COMPUTER AIDED SOFTWARE ENGIN V-1-145

# INPUT HARDWARE PROGRAMS

| AGENCY    | PROGRAM                                  | PAR<br>NUMBER |  |
|-----------|--|---------------|--|
|           |  |               |  |
| AIR FORCE |  |               |  |
| AFDSDC    | COMMAND BUDGET AUTOMATED SYSTEM          | V-1-21        |  |
| AFAL      | DATA SERVICES CONTRACT FOR AFAL          | V-1-22        |  |
| ESD       | AIR FORCE WWMCCS ADP MODERNIZATION       | V-1-27        |  |
|           | SYSTEM ENGINEERING SUPPORT FOR NORAD COM | V-1-30        |  |
| AFLC      | JOINT UNIFORM SERVICES TECHNICAL INFORMA | V-1-53        |  |
| ESD       | SPECIAL OPERATIONS FORCES PLANNING ANW R | V-1-1.05      |  |
| AFSC      | AIR FORCE CALS                           | V-1-1.08      |  |
| HQ        | ENHANCED SORTS CAPABILITY ASSESSMENT MOD | V-1-112       |  |
| ESD       | WIS WORKSTATIONS AND ASSOCIATED PERIPHER | V-1-3.3.5     |  |
| ESD       | SURVIVABLE BASE RECOVERY AFTER ATTACK CO | V-1-3.20      |  |
| SSC       | STANDARD SOFTWARE REQUIREMENTS CONTRACTS | V-1-021       |  |
| ESD       | AIR FORCE AUTOMATED MISSION PLANNING SYS | V-1-123       |  |
| AFCAC     | AUTOMATED RECORDS MANAGEMENT SYSTEM      | V-1-124       |  |
| AFCAC     | OPERATIONAL LOCATION A DATABASE          | V-1-125       |  |
| ESD       | JOINT STAFF AUTOMATION FOR THE NINETIES  | V-1-126       |  |
| LIS       | DEFENSE EMERGENCY AUTHORITIES RETRIEVAL  | V-1-127       |  |
| AFCAC     | NAVY SUPERMINI COMPUTERS                 | V-1-128       |  |
| AFCAC     | DATABASE MACHINES                        | V-1-129       |  |
| ESD       | WWMCCS FOLLOW-ON MAINTENANCE CONTRACT    | V-1-130       |  |
| ASD       | SCIENTIFIC AND ENGINEERING WORKSTATIONS  | V-1-131       |  |

# INPUT SOFTWARE PROGRAMS

| AGENCY    | PROGRAM                                  | PAR<br>NUMBER |  |
|-----------|--|---------------|--|
|           |  |               |  |
| AIR FORCE |  |               |  |
| AFDSDC    | COMMAND BUDGET AUTOMATED SYSTEM          | V-1-21        |  |
| ESD       | AIR FORCE WWMCCS ADP MODERNIZATION       | V-1-27        |  |
| ESD       | SPECIAL OPERATIONS FORCES PLANNING ANW R | V-1-105       |  |
| AFSC      | AIR FORCE CALS                           | V-1-108       |  |
| ESD       | WIS WORKSTATIONS AND ASSOCIATED PERIPHER | V-1-115       |  |
| ESD       | SURVIVABLE BASE RECOVERY AFTER ATTACK CO | V-1-120       |  |
| SSC       | STANDARD SOFTWARE REQUIREMENTS CONTRACTS | V-1-121       |  |
| ESD       | AIR FORCE AUTOMATED MISSION PLANNING SYS | V-1-123       |  |
| AFCAC     | AUTOMATED RECORDS MANAGEMENT SYSTEM      | V-1-124       |  |
| AFCAC     | OPERATIONAL LOCATION A DATABASE          | V-1-125       |  |
| ESD       | JOINT STAFF AUTOMATION FOR THE NINETIES  | V-1-126       |  |
| LIS       | DEFENSE EMERGENCY AUTHORITIES RETRIEVAL  | V-1-127       |  |
| AFCAC     | NAVY SUPERMINI COMPUTERS                 | V-1-128       |  |
|           | TEMPEST II                               | V-1-142       |  |
|           | DATA ACQUISITION SYSTEM                  | V-1-143       |  |
| USAFRS    | OFFICE AUTOMATION AND RELATIONAL DATABAS | V-1-144       |  |
| SSC       | INTEGRATED COMPUTER AIDED SOFTWARE ENGIN | V-1-145       |  |
| AFCAC     | SCIENTIFIC/ENGINEERING COMPUTER ACQUISIT | V-1-146       |  |
| ARMY      |  |               |  |
| ISEC      | ARMY WWMCCS INFORMATION SYSTEM           | V-2-8         |  |

# INPUT PROFESSIONAL SERVICE PROGRAMS

| AGENCY    | PROGRAM                                  | PAR<br>NUMBER |
|-----------|--|---------------|
|           |  |               |
| AIR FORCE |  |               |
| AFDSDC    | COMMAND BUDGET AUTOMATED SYSTEM          | V-1-21        |
| AFAL      | DATA SERVICES CONTRACT FOR AFAL          | V-1-22        |
| ESD       | AIR FORCE WWMCCS ADP MODERNIZATION       | V-1-27        |
|           | SYSTEM ENGINEERING SUPPORT FOR NORAD COM | V-1-30        |
| AFLC      | JOINT UNIFORM SERVICES TECHNICAL INFORMA | V-1-53        |
| MAC       | ADVANCED COMPUTER FLIGHT PLAN            | V-1-93        |
| ESD       | SPECIAL OPERATIONS FORCES PLANNING ANW R | V-1-105       |
| AFSC      | AIR FORCE CALS                           | V-1-108       |
| HQ        | ENHANCED SORTS CAPABILITY ASSESSMENT MOD | V-1-112       |
| ESD       | WIS WORKSTATIONS AND ASSOCIATED PERIPHER | V-1-115       |
| ESD       | SURVIVABLE BASE RECOVERY AFTER ATTACK CO | V-1-120       |
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| AFCAC     | NAVY SUPERMINI COMPUTERS                 | V-1-128       |
| AFCAC     | DATABASE MACHINES                        | V-1-129       |
| ESD       | WWMCCS FOLLOW-ON MAINTENANCE CONTRACT    | V-1-13        |

# INPUT NETWORK SERVICES PROGRAMS

| AGENCY    | PROGRAM                                  | PAR<br>NUMBER |  |
|-----------|--|---------------|--|
|           |  |               |  |
| AIR FORCE |  |               |  |
| ESD       | AIR FORCE WWMCCS ADP MODERNIZATION       | V-1-27        |  |
| AFLC      | JOINT UNIFORM SERVICES TECHNICAL INFORMA | V-1-53        |  |
| AFSC      | AIR FORCE CALS                           | V-1-108       |  |
| ESD       | SURVIVABLE BASE RECOVERY AFTER ATTACK CO | V-1-120       |  |
| ESD       | JOINT STAFF AUTOMATION FOR THE NINETIES  | V-1-126       |  |
| AFCAC     | NAVY SUPERMINI COMPUTERS                 | V-1-128       |  |
|           | DATA ACQUISITION SYSTEM                  | V-1-143       |  |
| USAFRS    | OFFICE AUTOMATION AND RELATIONAL DATABAS | V-1-14        |  |
| NUV       |  |               |  |
| ARMY      |  |               |  |
| ISEC      | ARMY WWMCCS INFORMATION SYSTEM           | V-2-8         |  |
| AMC       | STANDARD DEPOT SYSTEMS MODERNIZATION     | V-2-28        |  |
|           | TELECOMMUNICATION MODERNIZATION PROGRAM  | V-2-32        |  |
|           | RESERVE COMPONENT AUTOMATION SYSTEM      | V-2-34        |  |
| MC        | ARMY CALS                                | V-2-35        |  |
|           | INTEGRATED PROCUREMENT SYSTEM            | V-2-36        |  |
| CECOM     | ARMY TACTICAL COMMAND AND CONTROL SYSTEM | V-2-38        |  |
| RDA       | ACQUISITION INFORMATION MANAGEMENT PROGR | V-2-39        |  |
| USAISSAA  | MILITARY PAY REDESIGN JOINT SERVICE SOFT | V-2-41        |  |
| USAISSAA  | INSPECTOR GENERAL NETWORK II             | V-2-46        |  |
| CECOM     | CONUS TELEPHONE MODERNIZATION PROGRAM    | V-2-47        |  |

STATUS: ACTIVE

X

AGENCY: CODE: DATE:

NAVY H5503102 01/25/91\*

NSSC

PROGRAM: ACRONYM: SSTS

SHIP SERVICE TELEPHONE SYSTEM

SERVICES:

SOFTWARE PRODUCTS PROFESSIONAL SERVICES > SYSTEMS SYSTEMS SYSTEMS SYSTEMS INTEGRATION

TURNKEY SYSTEMS PROCESSING SERVICES

HARDWARE NETWORK SERVICES

IMAGE SYSTEMS SECURE SYSTEMS

SYSTEMS OPERATIONS OTHER

FUNDING: FY1991 FY1992 FY1993 FY1994 FY1995 FY1996 (\$K) 0 0 0 0 0

(\$K) 0 0 0

SCHEDULE: DRAFT: CBD PRE-BID RFP/RFQ
(SOW) ANN: CONF.: RELEASE: BID DUE: AWARD:

5/88 1/10/90 1Q/FY92

RFC

(See Note B)

(See Note A)

CONTRACT TYPE(S): DURATION:

Firm fixed price One year, with four

one-year options.

CONTRACTING OFFICE: PROGRAM OFFICE:

Chris Hannah Mr. Jerry Miller

NAVSEA SYSCOM Jim Hrin

Code 0241A NAVSEA SYSCOM, 61Z128
2531 Jefferson Davis Hgwy National Center, Bldg 2

Arlington, VA 22202 2531 Jefferson Davis Hgwy

(703) 602-0200 (703) 602-8260

V-3-102-1

#### DESCRIPTION:

This procurement will replace the existing Dimension 2000 system on approximately 300 Naval ships with a ruggedized telephone system for shipboard applications. The new PBX system will be installed on 40-50 new and retrofit ships each year. It must be a non-developmental item (NDI) which utilizes universally available equipment.

## BACKGROUND/FUNCTION:

The Navy's existing Ship Service Telephone System is ten years old and can no longer be supported. Replacement parts and new equipment are no longer available to outfit existing and new ships.

The PBX must be expandable from 50 to 200 lines, and be packaged in a ruggedized cabinet meeting specific MIL-SPEC requirements. PBX's shall be upgradable to ISDN, interface with the STU-III telephone, and be capable of data transmission. Remote maintenance, fiber optic connections to trunks & terminals, and menu-driven system management will be given valuable consideration.

#### ANALYSIS:

(Note A) No funding information was available from the Navy's FY91 budget submission to OMB.

An additional technical contact on this program:

Richard Maynard NAVSEA COMBATSYSENG Code 423 835 Philpotts Rd. Norfolk, VA 23513 (804) 444-9325

#### ACQUISITION PLAN:

(Note B) An announcement appeared in the CBD on 1/10/90, acting as a "sources sought" for solicitation #N00024-90-R-4131. Presently, the proposed procurement will be for submarines only and encompass approximately 100 PBX's. It has been indicated that, after successful upgrade of the submarines, an additional 300 PBX's may be purchased for a variety of other naval vessels.

The Program Office has just issued the Procurement Request (PR) to the Contracting Office. An RFP is expected to be released in

V-3-102-2

the first quarter of FY92.

The Program Office has indicated that three companies, which it would not reveal, are currently working closely with the Program Office doing their own building and testing according to Navy specifications in the RFI.

AWARDS TO DATE

None.

<sup>\*</sup>Original date 11/13/88; previous revisions 8/15/89, 3/15/90, 8/14/90.



STATUS: ACTIVE

AGENCY: CODE: DATE:

DEFENSE H454G005 01/15/91\*

DCA

PROGRAM: ACRONYM: JOPES

JOINT OPERATIONS PLANNING AND EXECUTION SYSTEM

SERVICES:

SOFTWARE PRODUCTS X PROFESSIONAL SERVICES X

OFFICE INFORMATION SYSTEMS SYSTEMS INTEGRATION

TURNKEY SYSTEMS PROCESSING SERVICES HARDWARE NETWORK SERVICES

IMAGE SYSTEMS SECURE SYSTEMS SYSTEMS OTHER

FUNDING: FY1991 FY1992 FY1993 FY1994 FY1995 FY1996 (\$K) 59229 49342 46780 51762 0 0

(\$K) 5 (See Note A)

SCHEDULE: DRAFT: CBD PRE-BID RFP/RFQ

(SOW) ANN: CONF.: RELEASE: BID DUE: AWARD:

8/28/90 1/28/91 3/15/90

12/17/90

(See Note B)

CONTRACT TYPE(S): DURATION:

Firm Fixed Price

Base period of 27 months

with 2 one-year options

CONTRACTING OFFICE: PROGRAM OFFICE:

Leo Milanowski Jack Stegman/David Miquelon

Contract Management Div. WAM Program Office

DCA Code PMR (Hudson) Room MF618 8th St. & S. Courthouse Rd The Pentagon

Arlington, VA 22204 Washington, DC 20310

(202) 692-3055 (703) 487-8509

693-6345

V-4G-5-1

#### DESCRIPTION:

The Joint Operations Planning & Execution System is an Ada development effort to help automate the World Wide Military Command and Control System (WWMCCS). JOPES is under the WAM initiative (see PAR V-4G-2).

## BACKGROUND/FUNCTION:

In 1983, when the WWMCCS Information System (WIS) was getting started, a JOPES planning contract was awarded to GTE. JOPES was a WIS program, under the direction of the Air Force. Over the past 7 years, GTE has done developmental work on the Ada software to be used by JOPES. However, WIS became WAM in 1989, when it was turned over to DCA. Whereas WIS as an effort to replace the entire WWMCCS system with new equipment and software, WAM is a smaller undertaking consisting of software development to upgrade WWMCCS.

Presently, Phase I of JOPES is under WAM. This half (consisting of 11 versions of software) will end around FY95, when DCA will review the progress of the program and decide on its full implementation. Thus far, GTE's Ada development efforts have aided DCA, and the U.S. Transportation Command to build version 4 of the software. Versions 1 and 2 have been completed and are in operation. Version 3 is going out in a matter of days; Version 4 will be installed next year by DCA. (During 1989, DCA extended GTE's contract -- to deliver a finished version 4 by FY91. Basically, DCA did this because GTE already had started the JOPES software development effort, and therefore had valuable experience.) The draft RFP for the software development of Versions 5-11 of JOPES is currently in the DCA library for vendor review. The final RFP is expected to be released by January 1991 and the award will be made in 2QFY91. The versions are expected to be fielded at the rate of 2/year beginning in 1991 -- so that Phase I of JOPES will be finished in 1995.

JOPES will support the processes of threat identification and assessment, strategy determination, course of action development, and detailed planning and execution.

#### ANALYSIS:

(Note A) Funding information was taken from DCA's FY91 budget submission to OMB. The Contract Specialist is Jean Hudson (202) 692-3159.

A reading room is available to interested vendors. Contact Andrias G. Wood, (202) 692-2743, for more information.

V-4G-5-2

## ACQUISITION PLAN:

(Note B) A notice appeared in the CBD on 8/28/90 announcing the availability of a draft Statement of Work (SOW). The draft RFP (DCA100-90-R-0280) for versions 5-11 of JOPES is currently in the DCA library for vendor review. A notice in the CBD on 12/17/90 announced the RFP for JOPES software versions 5-11 will be issued on or about 1/28/91 with bids due 45 days later.

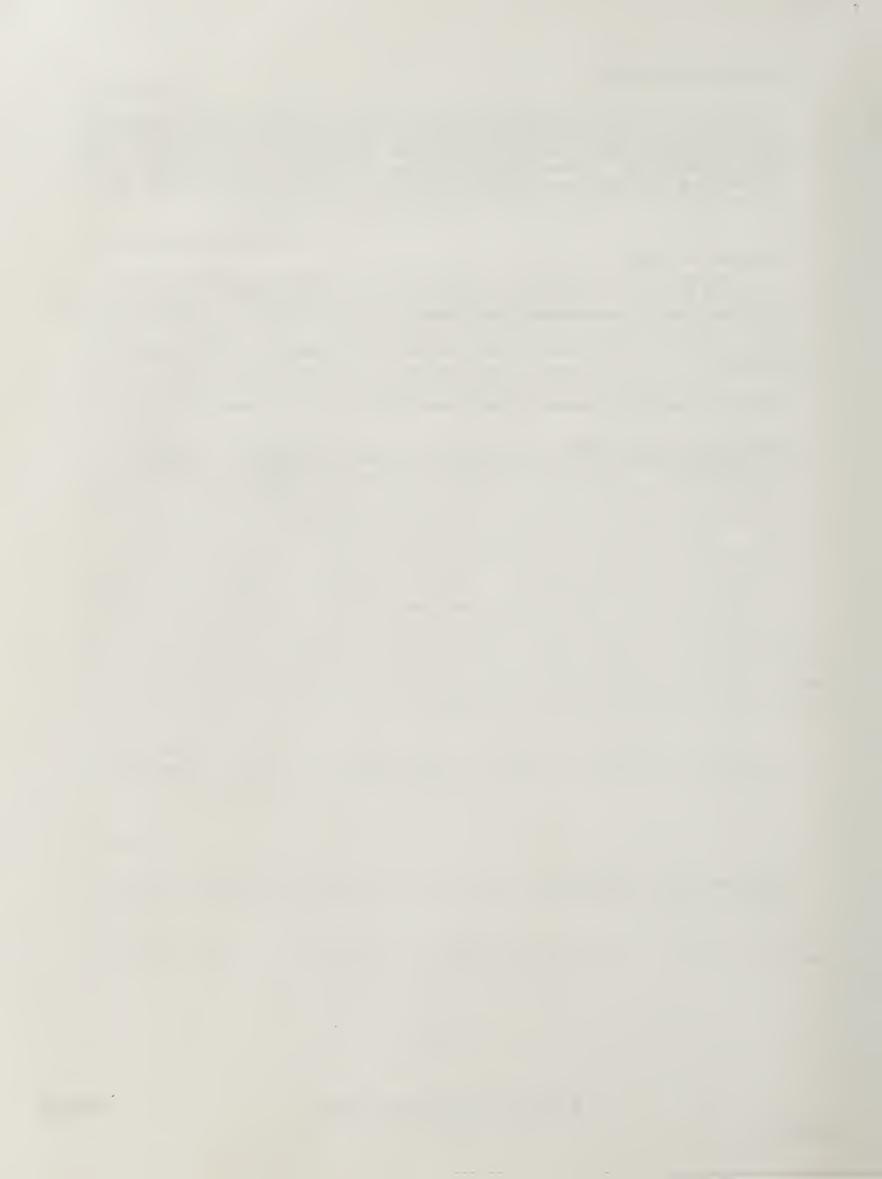
#### AWARDS TO DATE:

Systems Research and Applications (SRA), for JOPES development and implementation management system. Awarded 1984.

GTE, for WIS planning, development, and integration. Awarded 11/83.

GTE, for JOPES extension contract, DCA100-89-C-0066.

<sup>\*</sup>Original date 3/15/90; previous revisions 6/15/90, 7/24/90, 11/20/90.



STATUS: ACTIVE

AGENCY: CODE: DATE:

JUSTICE H5710031 01/31/91\*

DEA

PROGRAM: ACRONYM:

OFFICE AUTOMATION

SERVICES:

SOFTWARE PRODUCTS X PROFESSIONAL SERVICES X
OFFICE INFORMATION SYSTEMS SYSTEMS INTEGRATION
TURNKEY SYSTEMS PROCESSING SERVICES
HARDWARE X NETWORK SERVICES X

IMAGE SYSTEMS SECURE SYSTEMS

SYSTEMS OPERATIONS OTHER

FUNDING: FY1991 FY1992 FY1993 FY1994 FY1995 FY1996 (\$K) 31363 8373 2115 1304 974 0

(See Note A)

SCHEDULE: DRAFT: CBD PRE-BID RFP/RFQ

(SOW) ANN: CONF.: RELEASE: BID DUE: AWARD:

(See Note B)

CONTRACT TYPE(S): DURATION:

TBD

CONTRACTING OFFICE: PROGRAM OFFICE:

Burdette Burton Delphine F. Day
Contract Specialist OA Section Chief
Drug Enforcement Agency Drug Enforcement Agency

Washington, DC 20537 Washington, DC 20537

1311119con, be 2000.

(202) 307-7812 (202) 307-9875

DESCRIPTION:

VII-10-31-1

This procurement will provide for the replacement of the current office automation system in use at the Drug Enforcement Agency.

## BACKGROUND/FUNCTION:

The DEA Office Automation System is used to access DEA's information systems, to prepare DEA enforcement and administrative documents, to send secure electronic mail between all DEA domestic offices and to provide local data processing functions. These functions include data base management, project planning, statistics, graphics, and spreadsheet processing.

The current system's functions were formerly performed by two networks, the DEA Automated Teleprocessing System (DATS), and the Secure Teletypewriter System (STS). In addition, the OA System now performs functions previously accomplished by separate pieces of equipment: 3270 DATS terminals, teletypewriters, word processors, and personal computers.

#### ANALYSIS:

(Note A) This funding information was taken from the DEA A-11 budget submission to OMB for FY1991.

## ACQUISITION PLAN:

(Note B) The Program Office stated that although the recompete for this contract has not been planned at this time, a new full and open competition is anticipated. The RFP preparation would start within one year. The turnkey system installed by Federal Data Corporation starting in 1986 has a life of eight years.

The status of this PAR has not changed.

## AWARDS TO DATE:

Federal Data Corporation; contract DEA-86-3; contact value is approximately \$100 million.

\*Original date 9/10/90.

VII-10-31-2

# The Federal Electronic Imaging Market is Growing Fast . . .

# Dcar Colleague:

One federal market is growing so fast and in so many different directions that it has been difficult for many analysts to pin down. The market for electronic imaging equipment and services is one of the hottest technology markets in the world right now.

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Regards,

John Frank President, INPUT, INC.

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# Report Highlights

# Market Analysis and Forecast

- Market Condition
- Market Pressures
- Market Forecast
  - Civilian Agency Forecast
  - Defense Agency Forecast
- Leading Vendors
- Recommendations

# Agency Issues

- Environment
- Leading Applications and Types of Systems
  - Current Imaging Applications
  - Future Imaging Applications
  - Types of Imaging Systems
- Installation Profile
  - Current Projects
  - Contract Awards
- Acquisition Plans and Preferences
  - Acquisition Plans
  - Justification and Benefit
  - Methods of Acquisition
  - Selection Criteria
  - Preference for Type of Vendor
- Standards and Legality
  - Imaging Standards

# **Key Opportunities**

- Present and Future Programs
- Federal Electronic Imaging Opportunities by Agency

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The report is available now.

This is not speculation. INPUT's analyses and conclusions are based on comprehensive research into the federal government's own procurement plans. The OMB/GSA/NBS Five-Year Information Technology Plans for 1991 through 1996 yielded crucial insights, as did the OMB's report on its Five-Year Plan for Meeting the ADP and Telecommunications Needs

of the Federal Government. Other sources included reviews of federal agency FY90 and FY91 information technology budgets, and direct interviews with federal agencies that have active or planned imaging system acquisitions.

But for a number of reasons, not all imaging procurements show up in these documents. So to complete the picture, INPUT went through the individual procurements listed in its Procurement Analysis Reports, and added all of the imaging contracts that escaped mention in other sources.

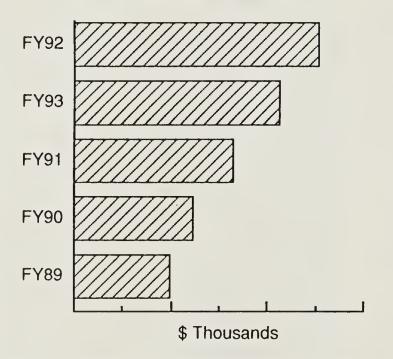
The result is an exhaustive listing and analysis of imaging procurement activity, together with analyses of the forces—large and small—that shape this market's future.

# **Tracking Rapid Change**

In a market as young and fast-changing as electronic imaging, vendors need answers to many questions about the market itself if they are to deploy their resources to exploit opportunities when they occur:

- How big is the market, and how fast will it grow over the next five years?
- · Which product segments are growing fastest?
- How do civilian and defense agency imaging markets compare?
- To what extent do imaging standards exist?
- How are they affecting procurements, if at all?
- What five forces are driving the growing demand for imaging?
- What five vendors are dominating the imaging market?
- What five selection criteria are most important for agencies in this market?
- What role does a belief in paper reduction play in agency procurement decisions?
- Will the controversy over the legal status of electronic images dampen the market?

# **Proposed Expenditures** for Imaging Technology



Source: Five-Year Plan for Meeting the ADP and Telecommunications Needs of the Federal Government

THE TRENDLINE for imaging expenditures over a fiveyear period is made obvious in INPUT's bar chart. What is not obvious is what accounts for these expenditures analysis that INPUT includes in the text of the report.



- Which applications dominate the civilian sector? The defense sector? Are they likely to change?
- Which applications are most sought after in the short term?

And a host of other questions that show you the general outlines of the federal electronic imaging market.

# **Defining Your Success**

But INPUT does not stop there. In addition to this relatively broad-brush portrait, it gives you the targeted intelligence about the specific market opportunities that ultimately define your success:

- What are the key imaging systems procurement opportunities and what are their values, by agency and PAR number?
- What is the relative proportion of agencies with and without imaging systems?
- What proportion have plans to acquire imaging systems next year? Through 1996?
- How many have done feasibility studies?
   Done requirements analyses? Gone to prototype?
- Which categories of imaging systems are agencies most likely to be planning to develop now?

- What percentage will develop them in house?
   What percentage will use a systems integrator?
- What imaging contracts have been awarded in the recent past—by agency, subagency, title, vendor, and dollar amount?
- What is the agency average for anticipated spending on imaging systems over the next five years?
- Which agencies are planning to acquire imaging systems over the next five years?
- Exactly how do agencies rate various cost justifications for imaging systems?
- · How do they rate acquisition methods?
- What types of vendors do they prefer?

And more of the precise, tactical information that you have to have to sell successfully to this turbulent market.

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provides planning information, analysis, and recommendations for the information technology market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

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# FEDERAL ELECTRONIC IMAGING MARKET

- ▲ How do civilian and defense agency markets compare?
  - ▲ Which agencies are planning procurements?
    - ▲ How will the new systems be developed?
      - ▲ Why are agencies buying these systems?
        - ▲ How do they rate imaging vendors?



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- Systems Operations
- Telecommunications
- Software Products
- Professional Services
- Processing Equipment
- Computer Equipment
- Office Information Systems
- Electronic Data Interchange (EDI)

# Agency Perspectives

- Agency Overview
- Major Information Systems Acquisition Plans
- Acquisition Plans and Procedures
- Vendor Preferences
- System Integration Trends
- Centralized/Decentralized Directions
- Use of IS Vendors

## **Vendor Views**

- Contracted Services Changes
- Contract Functionality
- Contracting Views
- Marketing Perceptions

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- Important vendor characteristics and services

As a comprehensive analysis of the important competitive factors and considerations in the DLA market, this report is an indispensable planning tool to information services executives and managers who want to take advantage of DLA opportunies.

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- IDENTIFY competitors and potential teaming partners

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- Defense and civil agency requirements and trends
- Competitive analysis and profiles
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# U.S. EDI Federal Market

- Market Analysis and Forecast
- Federal Agency Requirements and Trends
- Competitive Trends
- Key Opportunities

# **Agency Perspectives**

- Functional Requirements
- · Performance Criteria
- Laws, Policies, Regulations
- · Acquisition Plans and Preferences
- Vendor Performance

# **Vendor Perspectives**

- Vendor Participation
- Market Issues
- Vendor Selection and Performance
- Teaming Patterns

# WHAT ARE THE PRESSURES IN THE FEDERAL EDI MARKET?

Understanding the commercial and budgetary pressures that are increasing EDI implementation in government agencies is vital to developing growth strategies in this market. Commercial expectations, agency staffing inadequacies, and the government's reliance on information technology are discussed in terms of their impact on the federal EDI market. Industry concerns, such as security, legal issues, and budgetary constraints, are also analyzed.

# HOW DO WE MARKET EDI PRODUCTS AND SERVICES TO THE FEDERAL GOVERNMENT?

Effective marketing to the government requires a thorough knowledge of federal EDI applications and priorities and the unique procurement mechanisms in government agencies. This report explores the specific EDI applications important to government agencies, product requirements, and unmet needs.

In addition, the report reviews the sales issues unique to the federal market, including procurement policies and preferences, vendor selection criteria, and existing contracts and programs.

# WHERE DO MARKET OPPORTUNITIES EXIST IN THE FEDERAL MARKET?

This report forecasts market size and growth rates across the major delivery modes comprising the EDI market in order to provide you with flexible assessments of market opportunity. Each forecast is based on stated assumptions and analysis of major trends in the market. By providing accurate and substantiated market forecasts, this INPUT report is the starting point for your successful market and strategic plans.



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The federal government will be a major force in the implementation of EDI in the U.S. in order to improve productivity and overcome staffing inadequacies at agencies. INPUT's forecast for the next five years calls for the federal EDI market to continue its growth despite budget restrictions and regulatory conditions impacting the federal marketplace.

The newly updated report on the U.S. EDI Federal Markets, 1989-1994 focuses on the current responses of the federal agency and vendor communities to issues, trends, and changing needs of this market. It also analyzes the government's direct role in implementing EDI with its 500,000 suppliers and its continual influence through standards and regulations.

To receive your copy of this informative report, please mail or fax the enclosed order form, or call INPUT at (703) 847-6870 or (415) 961-3300.

Best regards,

John E. Frank

President, INPUT Inc.

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# growing implementation of EDI

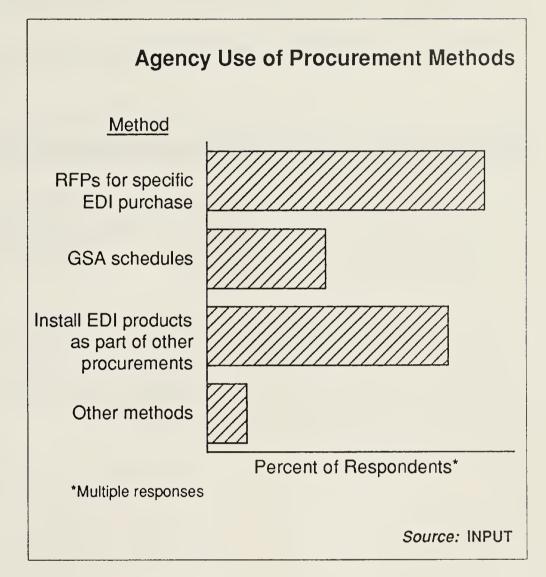
## FEATURES AND BENEFITS OF THIS REPORT

U.S. EDI Federal Markets is based on research of agency long-range plans for EDI programs and new system installations. Federal agency officials and EDI vendor executives were interviewed to obtain information on agency plans and product development strategies.

As a comprehensive analysis of the important competitive factors and considerations in the federal EDI market, this report is an indispensable planning tool to marketing and operations executives and managers tho plan to take advantage of this wing opportunity.

The *U.S. EDI Federal Market* report is one of a series of federal market analysis reports. Other reports in the program include:

- Federal Microcomputer Market, 1989-1994
- Federal Software and Related Services Market, 1989-1994
- Federal Systems Integration Market, 1989-1994
- Defense Logistics Agency Information Services Market
- Federal Processing Services/Systems Operations Market, 1989-1994
- Federal Professional Services Market, 1989-1994



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# How to Find and Manage the Market Opportunities in Federal Processing Services and Systems Operations...

## Federal Processing Services/Systems Operations Market, 1989–1994

### This report will help you:

- FIND specific agency opportunities in this market
- DEVELOP marketing strategies and services that will bring agency business
- IDENTIFY competitors and potential teaming partners
- REFINE your bidding and pricing strategies to maximize profitability
- IMPROVE agency satisfaction with your services

### The report contains:

- Market forecasts through 1994
- Agency requirements and purchasing trends
- Competitive analysis
- Recommendations

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# Develop Your Successful Strategic/Market Plan from Our In-Depth Industry Coverage

The federal government market for processing services and systems operations is experiencing new growth. The federal government's increasing reliance on information technology to improve productivity and accomodate staffing inadequacies provides numerous opportunities for vendors that supply transaction processing, batch, and operational support services.

### Federal Processing Services/ Systems Operations Market

Market Analysis and Forecast, 1989-1994

- Historical Perspective
- Budgetary Constraints
- Software Integration and Productivity Improvements
- Artificial Intelligence
- Leading Vendors

### Federal User Requirements and Trends

- · Problems and Issues
- · Budget and Application Distribution
- Agency Perceptions
- Acquisition Plans and Preferences
- Projected Trends in Processing Services and Operational Support

### Competitive Trends

- Vendor Participation
- Vendor Market Perceptions
- Vendor Contracting Views
- Trends
- Recommendations

Key Opportunities

This new report from INPUT, Federal Processing Services/Systems Operations Market, 1989–1994, shows you where and how to compete in the federal market for operational support. This report is a comprehensive analysis of the factors driving this market's growth, providing strategies needed to succeed in the intensifying competitive environment. It answers the important questions you have about this market.

# Why is the federal processing services/systems operation market growing?

This report presents INPUT's analysis of the federal market for processing services and systems operations (operational support). It analyzes how market growth is being encouraged by the increasing versatility of processing services and operational support and the trend towards automation of government operations.

The report identifies the market segments and applications that will grow rapidly and the markets that will experience slower growth. The growth of systems operations is a focus of this report. The report also discusses the factors that will sustain the market despite its maturity and budgetary constraints, including the government's facilities limitations and its efforts to modernize and improve efficiency.

## How do I market to the various agencies?

Vendors in this market need to maximize their marketing efforts towards current and future government requirements in key applications. By analyzing the types of functions government agencies are contracting out, this report helps to focus your product and service offerings in hig growth segments.



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### Gain Insight into the Federal Processing Services/ Systems Operations Market

The federal government's reliance on information technology to improve productivity and overcome staffing inadequacies has spurred growth in the processing services and systems operations markets. INPUT's forecast for the next five years calls for the market to continue its growth despite budget restrictions and regulatory conditions impacting the federal marketplace.

The just-completed report on the Federal Processing Services/ Systems Operations Market, 1989-1994 focuses on the current responses of the federal agency and vendor communities to issues, trends, and changing needs of this market. It also analyzes the government's continued requirements to support a wide range of applications to develop recommendations to vendors for better focus of their product offerings.

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President

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The report also explores marketing and sales issues unique to the federal government, including procurement policies and preferences, vendor selection criteria, and planned uses of contractor services in operational support.

## What are the most appropriate pricing strategies in this market?

Successful pricing strategies are vital to capitalize on agency opportunities in this market. The report includes recommendations on how to improve margins and gain competitive advantage through cost controls and alliances.

The report identifies the leading vendors that have established significant shares of the federal vernment's processing services and systems perations market. Hardware, software, and service vendors can use the report to identify specific agency opportunities, possible teaming partners, and appropriate bidding strategies.

### Features and Benefits of this Report

This study is based on interviews with agency officials and vendor representatives, as well as data collected from published government sources. (Agency program data and updated vendor information was collected by INPUT during 1989.)

The survey illustrates the views, in both the government and the industry, regarding:

- Current and future agency use of processing services and systems operations
- Leading vendors and performance evaluations
- Strategies
- Issues and trends

### **Federal Market Pressures**

- Staff shortages
- · Labor-intensive process
- Mission contracting
- · Cost-cutting
- · High attrition

Federal Processing Services/Systems Operations
Market, 1989–1994 is a complete assessment of
agency requirements, competition, and evolving
trends and issues. It provides market intelligence
to marketing and planning executives to assist
them in developing successful marketing plans,
assessing capabilities, and analyzing the
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# If You Need to Know What's Going On in Government Systems Integration . . .

- ▲ Pressure to redesign aging systems
- ▲ Changing agency requirements
- ▲ Pressure to share risks
- ▲ Pressure to do more with less
- Attacks on the concept of systems integration

# You need INPUT's latest comprehensive The Federal Systems Integration Market,

You can have a report that explains in detail the crucial dynamics of the Federal Systems Integration market today.

And if you act before February 28, 1990, you'll pay \$150 less than the standard list price—a savings of 10%!

### Federal Systems Integration Market, 1989-1994

- · Market Analysis and Forecast
- Agency Requirements
- Systems Integration Vendors
- Key Opportunities

### Agency Perspective

- Hardware Systems
- Systems Applications
- Agency Perceptions
- · Case Studies of Contracts
- Acquisition Plans and Preferences
- Projected Trends

### Vendor Perspective

- Vendor Participation
- Vendor Market Perceptions
- Vendor Contracting Views
- Trends

A brand new revision of INPUT's respected survey, Federal Systems Integration Market, 1989-1994, gives executives who must sell into this market invaluable intelligence tailored specifically to their needs—and to the needs of a gigantic market in a state of flux.

The rules for successfully penetrating this market will never be the same. INPUT's new report tells you how they've changed, and helps you turn those changes to your advantage.

Of course the report gives you a broad market overview, seasoned with the combined experience and expertise of a research staff that knows more about how Washington works than any other computer market research firm. But the report also gets down to the nitty gritty, giving you detailed analyses of:

- What the requirements of the different agencies are today, and how they are likely to change over time;
- Who the major players are in federal systems integration, and how they can give flexible competitors new opportunities for increasing market share; and
- When and how the major contracts will be put out to bid, and who will be involved.

And that's not all...

### Six Ways the Market Is Changing

The report also details the six major pressures on the federal systems integration market, and explains how they are acting in concert to change the way you have to do business:

• Pressure for Improved Productivity—The overall constraints of the Gramm-Rudman budget axe and the increasing scrutiny of information systems expenditures could seriously affect you. The report offers an analysis.



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### Dear Colleague:

Marketing systems integration products and services to the federal government just got a whole lot easier.

INPUT recently released the newest edition of its respected survey of the Federal Systems Integration Market, 1989-1994. This publication is written for just one audience: marketers who must master the intricacies of this evolving market. The report clarifies the complex trends, changing policies, and shifting growth rates of government systems integration—and then offers clear recommendations for future action.

Systems integration is growing fast. In fact, it is one of the star segments of the government market. But the influence of budgetary concerns, new policies, scarce personnel, and changing agency requirements make the market's growth anything but easy to exploit.

INPUT's report offers guidance: timely data, some difficult-toobtain market intelligence, and a lot of clear recommendations for making the most of this vast opportunity.

So order the report today. Make the most of it!

Yours sincerely,

John Frank

President, INPUT INC.



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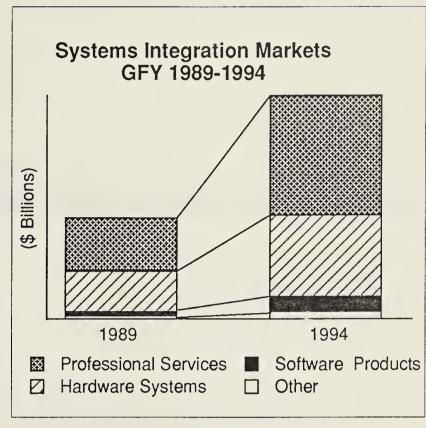
## Survey, 1989-1994

- Pressure to Redesign Aging Systems— Government hardware and software systems are patchworks with no integrated design. That means tremendous opportunities for systems integration work, which the report analyzes in some detail.
- Pressure to Overcome Staff Shortages—
  Government agencies are having a hard time
  hiring and retaining qualified technical staff, so
  they must offload technical work onto the
  private sector. INPUT's report discusses how
  you can turn this trend to your advantage.
- Pressure to Maintain Fair Competition—The entire process of awarding contracts has slowed significantly. INPUT offers some insight on how to avoid the worst delays, and how to minimize their impact on your company.
- Pressure to Share Risks—Agencies now want vendors to assume some of the financial risk of large systems integration contracts. The report analyzes how this problem could affect your operations, and offers guidelines on risk-sharing.
  - Pressure to Justify Integration—Recently, the GSA characterized systems integration as a "Grand Design" and suggested that it would not work. INPUT surveys the market's response.

### How To Cash In

The game has definitely changed. There's a new emphasis on project teams, joint ventures, subcontracting, budgeting, and project management. And above all, there is an overwhelming need for vendors to understand the details of the procurement process and how they can affect the bottom line.

Executives that understand how all of these changes are working to change their businesses can make intelligent decisions in the new Federal systems integration market, which is forecast to grow at a rate significantly faster than other technology markets over the next five years.



OVERALL GROWTH is useful information, but knowing which segments are growing fastest can help government marketers more. INPUT's report gives differential growth rates for the most important market segments.

And INPUT's Federal Systems Integration report gives you all the information you need to make those decisions today.

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# If You Need To Know How To Turn New Developments in EDI To Your Advantage...

- How is EDI being applied?
- What are users' concerns?
- How big is the market now and through 1995?
- Who are the leading EDI vendors?
- What sets their products and services apart?

# ... INPUT Shows You Where the EDI Opportunities Are!

The potential is that Electronic Data Interchange (EDI) could revolutionize every aspect of the way companies do business with each other.

But what exactly is happening in the EDI markets today and for the next five years? How fast will they grow? What forces are at work accelerating that growth? Slowing it down? How will they affect your company?

If you are an EDI vendor or user, the answers to these kinds of questions could have a dramatic impact on how you structure your own plans for growth over the next five years.

INPUT has published a new report entitled *The EDI Market*, 1990-1995, that is designed from the ground up to answer these questions.

### The Electronic Data Interchange Market, 1990-1995

### Background on EDI

### **EDI Input-Output Analysis**

- Definition and Relevance
- EDI Input-Output Matrix
- · Implications of Input-Output analysis

### Market Size and Forecast

### **EDI Market Trends**

- Software Products
- Network Services
- Professional Service Trends

### **EDI Trading Communities and Applications**

- Automobile Manufacturing
- · Paper, Printing, and Publishing Industries
- · Retail, Apparel, and Textile Industries
- · Etc.

Conclusions and Recommendations

And if you act before November 19, 1990, and buy just this report, you'll pay \$300 less than the regular list price for the report—a savings of 10 percent on targeted market intelligence that could change the way you do business!

INPUT is also publishing a report that complements this report's total-market focus. Entitled *EDI: Business Integration Issues*, this second report focuses on the practical questions of how individual businesses have solved the problems of EDI integration in the real world.

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A 20 percent savings for the complete picture!

EDI could transform companies' relationships with large vendors, with large customers, with banks insurance companies, and firms at every level product development, manufacturing, and distribution chain. And that will create tremendous opportunities for people with the right information.

### A Unique Analytical Tool

INPUT's report gives you that information. The result of more than a man-year of primary research into every aspect of electronic data interchange, *The EDI Market*, 1990-1995 gives EDI marketers and users unique insights into where this rapidly changing technology is headed *and why*. The report tells you:

- How big the market for EDI network services, software, and professional services is now, and how fast it will grow over the next five years.
- Who the leading EDI vendors are, and why their products and services have been embraced by the marketplace.
- Where the new market and product opportunities will be.
- What the dominant user trends are in EDI adoption, including what users say their reasons for implementation are, what kind of platforms they are using, how they are reconciling parallel papind electronic systems, and more.





The report also introduces a unique analytical tool called the EDI Input-Output Matrix. Using this matrix, vendors and users can focus on the issues that will have the greatest impact on their operations and overall profitability, clearly analyze the costs and benefits, and come to a rational conclusion regarding where EDI can give them a competitive advantage.

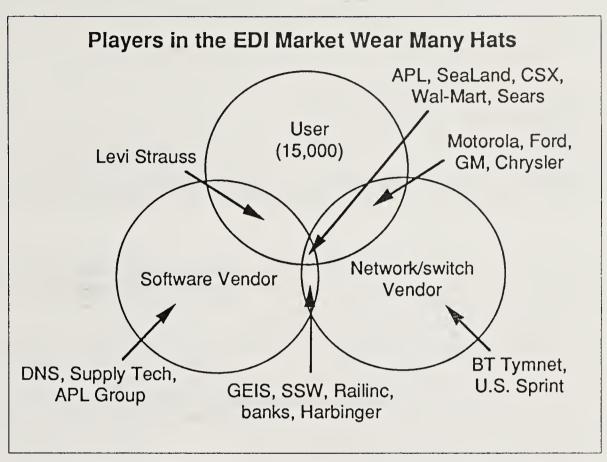
### Creating Competitive Advantage

The report does not stop with these issues. *The EDI Market*, 1990-1995 is a compendium of research that touches literally every significant aspect of this revolutionary technology:

- What impacts can be a pated from EDI server architectures?
- What role will value-added networks play in the future?
- How will the "Hub-and Spoke" phenomenon affect users' choices and vendors' product offerings?
- Where is the three-tiered market for messageswitching software headed?
- How will market consolidation affect providers of network services?
- Where are the opportunities in education and training?
- What are the major industries adopting EDI?
- How are their demands pushing development of real-time EDI and other advanced services?

Plus detailed case studies of institutions that have adopted EDI, analysis of future market and technical directions, and a set of in-depth recommendations for the major EDI constituencies (users and vendors).

Companies that want to take advantage of developments in EDI need the best market intelligence average. They need detailed analysis based on new primary research into every major facet of this potentially revolutionary technology.



EDI SERVICES AND SOFTWARE are provided by third party vendors as well as large hub users as shown in this exhibit from *The EDI Market*, 1990-1995.

That is what INPUT's *The EDI Market*, 1990-1995 gives you. It gives you the best data and analysis available.

It gives you a tool for building competitive advantage.

Use the enclosed order form to order your copy today and save 10 percent off the regular purchase price. Or buy the companion volume on *EDI: Business Integration Issues* too, and save 20 percent.

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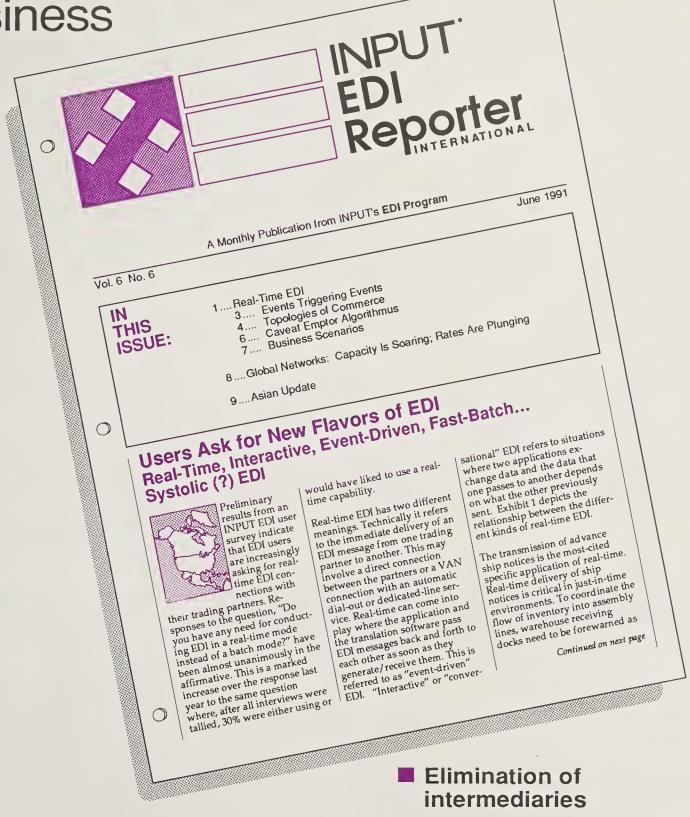
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# Electronic Commerce Is Changing the Way The World Does Business



Re-engineering of work

paper flows

Obliteration of traditional

# How Is Electronic Commerce Changing *Your* Business?

### Let INPUT Fill You In.

Business worldwide is increasingly being conducted in an electronic environment. Computer reservation systems, point-of-sale data applications, electronic funds transfers, transaction data bases, security-market trading systems, and EDI are creating a new commercial environment where all trade and exchange is enacted through an electronic infrastructure.

Consequently, the competitive nature of business is undergoing dramatic change.
Technologies that facilitate commercial exchanges are altering the economic and financial possibilities for profit making and for customer satisfaction.

Not a technical publication, *EDI Reporter* first and foremost answers the question, "When, where, and how does electronic commerce make sense from a business perspective?"

Subscribe now.
Call INPUT at
415-961-3300, mail the
enclosed order form,
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For users, *EDI Reporter* answers questions like the following:

- Where do EDI and electronic commerce fit in your business?
- Will EDI use provide significant competitive edge?

- Who is providing these solutions?
- What experiences, good and bad, have users had?

### Your Hotline to Electronic Commerce

Whether you are a user or vendor of electronic commerce and EDI—and increasingly these days, you are both—EDI Reporter presents in an easy-to-read, 12-page format the latest issues in this dynamic market:

- Case studies of EDI implementations based on personal interviews and site visits
- Product Profiles of new and upcoming EDI products
- Company Profiles of EDI product and service vendors
- Analysis of competitive issues, such as standards, that affect EDI implementation worldwide
- Empirical Market Data based on INPUT's ongoing user surveys and interviews
- Key Contacts—
   Identification of key people in the EDI user and vendor community

# ELECTRONIC COMMERCE

## Where Do You Fit In?

EDI Reporter, a monthly newsletter published by INPUT, is the only newsletter that illuminates this wholly new phenomenon of business.

How expensive will EDI implementation be?

For vendors, *EDI Reporter* answers:

• What are the most effective solutions you can offer potential users?

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### EDI Reporter International

### Yes!

Please enter my order as described:

- Subscription to INPUT's *EDI Reporter International* at the fee of \$350 per year per subscriber (outside North America—\$375).
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#### The contract of the contract o Textile Textile Mfg. Mfg. 1 Transport-Transportation ation 2 Using Electronics: 2 Apparel 4 handoffs; 3 weeks Mfg Apparel Mfg. The number of players and 3 transactions is reduced 3 Transportation Transportation Agent, 4 distributor wholesaler. Retail jobber outlet Using 5 Paper: Transport-Consumer ation 10 handoffs; 66 weeks 6 Paper-Based versus Electronic-Based Transport services **Industry Structure** provider It takes 66 weeks from the time a piece of cotton is 7 harvested to the time a shirt, fabricated from that cotton, is Transportpurchased by a consumer in a retail store. Ninety-eight ation percent of the time during that 66-week period, the 8 product, at whatever stage of production, is sitting idle—no transformative work is being performed on it; it is sitting in Distribution center a queue, warehouse, on a store shelf, etc. Electronic commerce aims to reduce this idle time so that working 9 stock is continually being converted to a valuable final Transportproduct in one uninterrupted value-adding series of ation processes. This exhibit depicts how the value chain of 10 textiles, apparel manufacturers, and retailers could reduce Retail the number of transactions in the value chain through the outlet adoption of electronic commerce. Consumer

- Graphic exhibits of business models, EDI communications links, etc. that illustrate clearly and concisely how and why EDI is implemented
- Upcoming Events of international EDI conferences and other meetings

## Turn Potential into Reality

Electronic commerce has tremendous potential to facilitate and transform how business is conducted worldwide. It's no longer a question of whether your business will be affected, but how and when. EDI Reporter

will give you this crucial information. Staying informed is the best way for you to turn potential into reality. Subscribe today.

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July 24 & 25 Systems Integration Conference—JW Marriott, Washington, D.C.

Sept. 17 & 18 Systems Operations Conference—JW Marriott, Washington, D.C.

Oct. 6, 7, & 8 1991 U.S. Executive Conference—Fairmont, San Francisco

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If You'd Like Detailed Information on How Companies
Are Dealing with EDI Integration Issues
Today...

- → How EDI changes accounting
  - → How EDI improves resource control
    - → How EDI changes workflows and job descriptions
      - How EDI enables new product and service offerings
        - → How some EDI users have become successful EDI vendors

# ...INPUT Analyzes EDI's Tactical and Strategic Impacts in the Real World!

Information on how EDI is really being used out there in the real world would be of tremendous value to users who want to avoid reinventing the wheel, and to vendors who want to refine their development and marketing efforts. Yet this information has been almost impossible to get.

Until now. INPUT has just released its new report on *EDI: Business Integration Issues*, a comprehensive and detailed analysis of the impacts of electronic data interchange on companies in every major industry.

This is not macroeconomic theory. This is casestudy analysis designed to ferret out the competitive advantages and disadvantages of EDI when companies—your competitors, clients, and suppliers—actually take the plunge.

### EDI: Business Integration Issues

The Organizational Impact of EDI

- The Tactical Impact of EDI
- The Strategic Impact of EDI
- Systemic Knowledge, EDI and Integration

Tying EDI to Business Operations and Strategy: Standards and Accounting

- Assessing When and Where EDI is Appropriate
- The Importance of Standards
- Problems and Issues with Today's EDI Standards
- Activity-Based Accounting and EDI

EDI Integration Tools and Allied Information Technologies

- EDI Software Products
- Messaging Systems and Environments
- Automatic Identification
- Data Capture

Conclusions & Recommendations

The report is based on ongoing primary research into one of the most complex and fast-moving technologies in existence. Interviews with vendors, with users, with standards-making bodies, with the people forging this new technology and its place in business today form the framework of the report. But the analysis by INPUT's EDI experts gives you an additional value-added interpretation that is available nowhere else.

And if you act before November 19, 1990, you'll pay \$200 less than the regular list price for the report—a savings of 10 percent!

EDI: Business Integration Issues is the only source of reliable and comprehensive information on the day-to-day integration questions that can have such a tremendous impact on how successful EDI is in normal business environments.

### Not Just Information

But it's not just information. INPUT's report is designed to put the tactical and strategic impacts of EDI into perspective, to allow users and vendors to answer the questions that bear on competitive advantage in their own markets:

- How does EDI change workflows and job descriptions? The report analyzes how buyers at Digital Equipment Corp. have become liaisons between customers and design engineers.
- How does EDI change accounting practices?
   The report investigates: the merger of ship notice and invoice for SuperValu, a large food retailer; the elimination of reconciliation disputes in the oil industry using an EDI package called Petroex; the switch from credit to debit mechanisms initiated by R.J. Reynolds Tobacco; and others.
- How does EDI enable companies to offer new products and services? The report detail e transformation of Merit Steamship Agency Inc., a mid-size shipping company, from agent

to electronic
information supplier
lks to EDI; the
evolution of customs
broker Penson and Co.
into a supplier of online information on
freight moving through
customs; the expansion
of Sears Roebuck's
product line to include
EDI software and
services; and more.

 How does EDI change the structure of organizations? The report describes: the development of closer relationships between

suppliers and their customers, including the pioneering efforts of Levi Strauss and Playtex; the merger of sellers' accounts receivable with buyers' accounts payable at General Electric Information Services Co.; the centralization of purchasing operations at Hewlett-Packard and 'vyn's.

And other impacts such as the role of EDI in mergers and acquisitions, coordinating manufacturing activities, and business expansion.

#### An Advantage in EDI

These case studies make up a large proportion of the report. But *EDI: Business Integration Issues* also addresses larger issues that place these company-specific developments in perspective:

- How is EDI restructuring value chains?
- How is it conferring competitive advantage in various industries?
- How do you assess when and where EDI is appropriate?
- How do you assess its effects on all departments?
- What are the potential impacts of new business strategies on EDI standards?
- w will developments in EDI data mappers, bar code technologies, data bases, and natural language processing affect EDI?

## EDI Is Best Suited for Repetitive Commercial Exchange of Well-Defined Products

|                 | a la                                   |  |
|-----------------|--|--|
| high            | <ul> <li>large professional service<br/>projects (construction)</li> </ul> | - fashion apparel  |
| product-feature | - big ticket items<br>(IBM 3090)   |  |
| ambiguity       | - once-a-year<br>expenditures  | <ul> <li>office supplies</li> <li>non-fashion apparel</li> <li>grocery products</li> <li>replacement parts</li> <li>transport documentation</li> </ul> |
|                 | low commercial   | l exchange high  |

Plus a thoughtful section on recommendations for EDI users and vendors, and a look into the technological and organizational future of electronic data interchange.

recurrence

EDI is here to stay, and its impacts will extend far beyond esoteric changes in accounting and purchasing practices. With changes of this magnitude happening this fast, there will be tremendous opportunities for competitive advantage if you have the right information.

And giving you the right information is what INPUT's EDI integration report is designed to do.

Do you want that advantage? Then fill out the enclosed order form and drop it in the mail today.

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"Bank providers should view corporate electronic trade payments (CETP) as a market offering that helps retain or bring in new corporate customers—not as a revenue generator in and of itself."

# To Make the Most of Your Future, INPUT Gives You a Crystal Ball . . . .

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Conference
Tyson's Corner Marriott, VA

July 24 & 25

Systems Integration Conference
Venue to be decided, Chicago

Sept. 11 & 12

Systems Operations Conference
Venue to be decided, Dallas

Oct. 6, 7, & 8

1991 U.S. Information Services Market Analysis
Conference
Venue to be decided, San Francisco

#### Look into the Future of CETP

While use of corporate electronic trade payments (CETP) is expected to increase dramatically over the four years, still only 25 of the 14,000 banks in the U.S. offer full CETP services. That means there's a huge market for CETP that has yet to be tapped. But entering this market is not straight forward—it requires the service provider to create it. And that requires the right information.

INPUT's new report, *Developments in Corporate Electronic Trade Payments*, gives you this information, providing the most comprehensive assessment of CETP available.

#### **Trends and Issues Clarified**

Through structured interviews with key EDI/EFT personnel at banks, software vendors, and user organizations, INPUT has developed a solid picture of what's going on in the CETP market and how it's likely to progress through 1995. Along with five-year CETP market revenue forecasts, it discusses:

#### **User Practices**

- How will CETP affect the number and size of payment transactions?
- Why do CETP users reduce the number of banks they use to disburse funds?
- How will the CETP user choose the banks to handle its electronic payments?

#### **Market Drivers**

- How are government programs driving the CETP market?
- How will the growth of EDI in general affect CETP specifically?
- How will restructuring and consolidation in the banking industry affect the market for CETP through 1995?
- Who will emerge as the key players in the CETP market—banks, service providers, telephone companies, corporate users?

#### **Emerging Payment Practices**

- What are the pros and cons of adopting a debit vs. a credit payment mechanism?
- How is "electronic barter" putting banks at risk of losing the payment franchise?
- How are non-banks getting into the business of electronic payments? How will this affect banks?

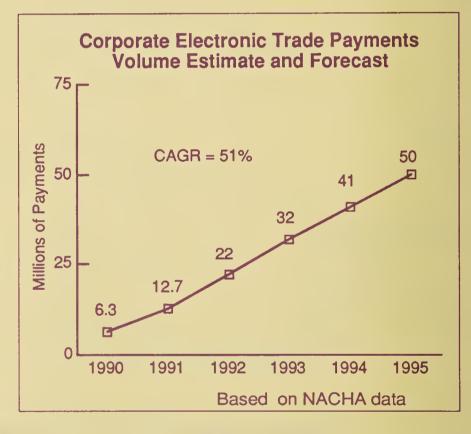
#### **Increased Competition on the Horizon**

The competitive environment for CETP is heating up, with not only banks but large corporate users, network service providers and software vendors vying for a piece of the action. INPUT's report profiles bank providers of CETP services, leading CETP service providers, software vendors, and eight user organizations. This kind of news about your competitors is exactly what you need to develop and market your services as effectively as possible.

- What kind of CETP software products are available?
- What services are banks offering to their corporate customers to enhance the value of their CETP programs?

CETP will continue to change the way banks do business with their corporate customers.
Understanding these changes, whether or not you currently offer CETP, is key to staying competitive in an industry that is facing consolidations, restructuring, and growing competition.

Let INPUT's report help you make the most of the CETP market. Don't miss out! Order your copy of Developments in Corporate Electronic Trade Payments today.



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Good Technological and Competitive Data
On Systems Integration
Can Be Hard To Find...

- What are the key technologies?
- What are the major players planning?
- What do users require from integrators?
- How are companies changing their offerings?
- How are vendors organizing?

# The Latest Information on Systems Integration



INPUT has just completed two reports that can help you meet the rigorous demands for information in the systems integration market—a market where every major business force is in a state of constant and simultaneous change.

The first, Systems Integration Technology Trends, is an incisive analysis of 14 major technologies and how important they will be to users in four industries over the next three years. How important the technologies are, how important integrators are to implementing them, which of the industries offers the greatest market opportunity—this report gives you detailed primary research on these questions and their answers.

The second report, *Systems Integration Vendors,* is a finegrained evaluation of the 24 major players in systems integration and how they are shaping or being shaped by the forces transforming the market today. Do you need to know product and service offerings, organization, financial performance, and strategies? This report is an in-depth examination of these and other questions that give you muchneeded insights into your competition.

These reports are the best primary research available today on the central questions in systems integration. And if you act now, you can enjoy a substantial discount off the standard price.

Order one report before August 5, 1991, and you'll save 10 percent off the regular list price!

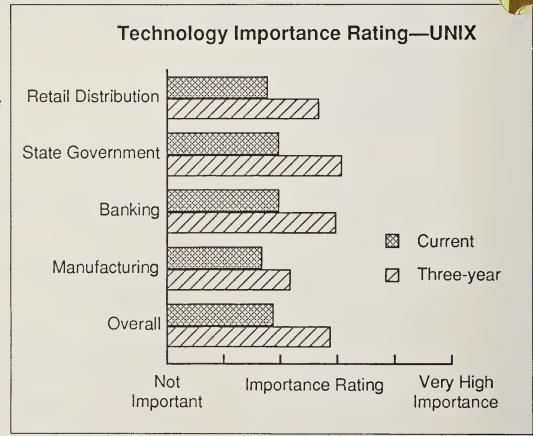
Or, order two reports before that date, and you'll save 20 percent!

In systems integration, the effects of technological and competitive changes are amplified by the very nature of the integration process. You have to keep abreast of these changes. Only timely and carefully researched analysis of these changes can give you a true advantage in this market. These reports provide such an analysis.

## What Technology Changes Mean

Systems Integration
Technology Trends is the result
of a research project to analyze
how important 14 key
technologies and the use of
systems integrators are to
users' technology and
application development plans
in four key industries. The
report answers:

- What are these 14 key technologies?
- How important is each technology to users' development plans in each of four major industries right now? Over the next three years?



RATINGS OF THE importance of 14 different technologies to 4 major industries illustrate both how much and where these technologies likely to grow over the next 3 years.

How do users in particular industries rate the skill levels of integrators and the importance of integrator use to implement the technology?

INPUT offers an entire section on each of the four major industries— manufacturing, banking, retail, and state government. Each section contains:

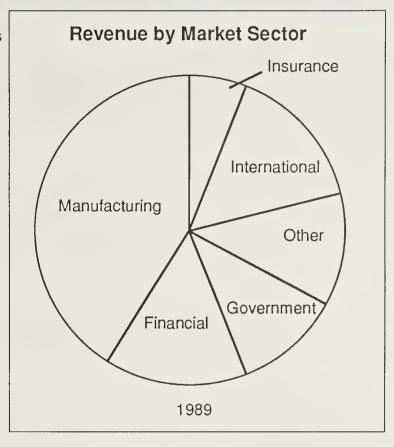
- An industry overview
- An analysis of the major business applications
- An examination of industryspecific technology trends
- An annotated listing of particular opportunities in that industry, and
- A discussion of planned applications

Technologies offering significant opportunity for many systems integrators are either now being implemented or soon will be. UNIX, distributed systems, LANs, relational data bases, electronic imaging—some of these technologies could offer major opportunities. Some are less important than many believe.

What do these changes mean? INPUT has already deployed its senior analysts and powerful research infrastructure to answer that question in *Systems Integration Technology Trends*.

## A Window on the Competition

Systems Integration Vendors is the complement to the technology report and concentrates on the major competitors and competitive forces you have to face every day. It begins with an analysis of the structure of the market, management issues, and the



TOTAL REVENUES broken out by market sector—as well as other crucial market data—is the kind of competitive information included in INPUT's company profiles.

major market forces operating in systems integration today, including:

- Major vendors' business objectives
- Vendors' views of user motivations
- Allocation of SI resources
- Vendors' market focus, by various classes of vendors
- The use of alliances
- The role of proprietary products
- Many other aspects of the competitive structure of the market and market players

The majority of the report is detailed analyses of the 24 largest and most dominant vendors in this market. Systems Integration Vendors offers detailed examinations of product and service offerings, business results, alliances, markets and submarkets, competitive status, recent developments, market strategies, and more for each of these 24 players. This gives

you timely, targeted intelligence. It gives you a window on your competition.

#### **Applied Experience**

Separately, these two reports offer you the best available systems integration technology research and competitive analysis. Together, they can give you a tremendous competitive edge in one of the most complex and changeable markets in the information industry today.

Why not put INPUT's research on your team? Use the enclosed form to order your reports today!

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 1991 U.S. Information Services Market Analysis Conference—

Fairmont, San Francisco

# INPUT

What Are Your
Opportunities in the
Systems Integration
Subcontractor Market?

Find Your Answers in
Subcontracting to Client
Integrators—a report just
released from INPUT

# Are You Missing Opportunities in the SI Market by Bidding the Whole Project?

The concept of turning to vendors for IS implementation projects is now accepted. We have all heard about major contracts awarded for systems integration projects.

But not every IS organization is convinced. For a variety of reasons, organizations are managing their own SI projects—and calling on vendors to manage selected portions.

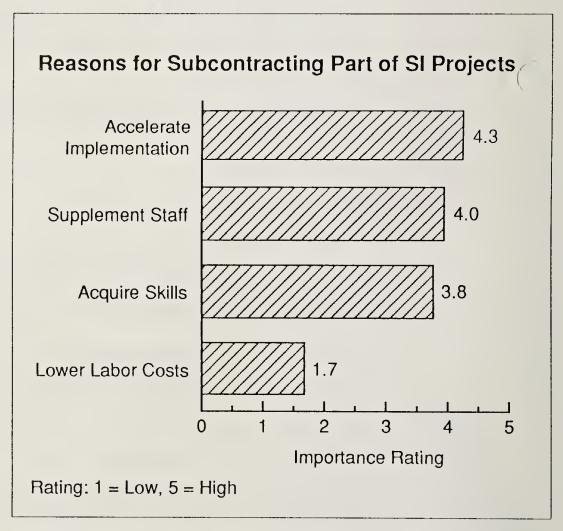
Subcontracted systems integration projects are a little-understood but significant opportunity for SI vendors.
Vendors need to know the dynamics of the market and what the competition is.
Subcontracting to Client Integrators, a new report from INPUT, will give you that insight.

## **Understand The Market Dynamics**

INPUT has defined this market as "the management of a portion of the (SI) contract—not merely providing staff to be

managed by the client integrator." The emphasis is on management. In the report you will find out:

- Why client integrators outsource only portions of an SI project
- What client integrators look for when they subcontract to vendors
- How integrators approach procurement of these services



THE PRESSURE to meet schedules outweighs the pressure to minimize co

Fax (703) 847-6872



#### Dear Colleague:

Make informed strategic and marketing decisions before you participate in the secondary market for systems integration project revenues. The in-depth analysis in INPUT's new report, *Subcontracting to Client Integrators*, will let you in on the issues you must address when marketing to client integrators. The report also identifies various vendor groups such as full-service vendors, VARs, and professional services firms, and analyzes their strategies.

The systems integration market grew at 20% between 1990 and 1991. And INPUT projects that it will continue to grow at an average annual rate of 18% through 1996. This is in direct contrast to INPUT's forecast of the total information services industry five-year growth of 12%.

Although we all read about major contract awards for outsourced systems integration projects, very rarely do we hear about smaller awards to vendors from internally managed SI projects.

You will find *Subcontracting to Client Integrators* typical of INPUT's in-depth, expert analysis of information services markets, and you can rely on our recommendations to support your planning decisions—the largest and most technically advanced companies have been doing just that for over 15 years.

I've enclosed a brochure for you with more details about the report, and a form so you can order INPUT's report and strengthen your strategic planning today.

Sincerely,

John Frank

President, INPUT, Inc.

blu & Trank

P.S. Please see the special price offer on the enclosed order form.





#### **ORDER FORM**

YES! I need INPUT's report, Subcontracting to Client Integrators.

Please supply the relevant information for all three of the following sections and return the form by mail or fax (see below), or call in your order.

| SECTION ONE:<br>MY ORDER                                  | Send me copy (copie Subcontracting to Client Integral                    | <b>^</b>  |
|---|--|---|
|   | ☐ I want to pay \$2,245 each, a saving ordering before December 20, 1993 |   |
|   | ☐ I'm ordering after December 20, 19                                     | 991, for the regular price of \$2,495 each.   |
|   | California clients: Please add applicable sales                          | •   |
| SECTION TWO: TERMS OF PAYMENT                             | ☐ Enclosed is my check for \$  | to cover the cost of my order.  |
| (CHOOSE ONE)  | ☐ Charge \$ to my .  Card #  |   |
|   | Exp. date  Name as it appears on my card                                 |   |
|   |  | on purchase order  chirty (30) day of invoice date. (First-time buyers oped immediately upon receipt of payment in full.) |
| SECTION THREE:  | Please see conditions on the other side of page.                         |   |
| AUTHORIZATION   | Authorized By:   | Accepted By INPUT:  |
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| Suite 560<br>Vienna, VA 22182                             | Name   | Name  |
| Tel. (703) 847-6870<br>Fax (703) 847-6872                 | Tide   | Title   |
| or<br>1280 Villa Street<br>Mountain View<br>CA 94041-1194 | Address  | Date  |
| Tel. (415) 961-3300<br>Fax (415) 961-3966                 | Telephone  |   |
|   | Signature Date   |   |

#### CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.



#### **Vendor Characteristics**

- Professional Services Firms
- · Platform/Systems Specialists
- Applications Specialists
- · Vendor Consortia
- Engineering Firms
- Competitive Environment
- · Vendor Options and Strategies

#### Market Characteristics

- SI Project Characteristics
- User Requirements
- · Subcontractor Selection Criteria
- Procurement Approaches
- Market Potential

#### Market Trends and Issues

- Market Drivers/Inhibitors
- Vendor/Client Relations
- User Issues

Conclusions and Recommendations

#### **Analyze The Competition**

Subcontracting vendors come from a variety of industry backgrounds. INPUT has segmented vendors by primary business categories—and identified representative participants in each category.

- What percent of revenue derives from subcontracted services to client integrators?
- What market strategies are most successful?
- How can a smaller or regional vendor access the market?

You will have the answers you need to make sound decisions when you read Subcontracting to Client Integrators.

Through its ongoing, in-depth analysis of this market, INPUT sees a definite opportunity for outside services' contributing to an internal systems integration effort. Opportunities range from small, short-term efforts to multiyear, multimillion-dollar contracts.

To take advantage of these opportunities, you need to know the IS organization's attitude toward subcontracts. You also need competitive information on the strategies vendors are using to increase market position.

If you are a systems integrator, a professional services firm, a VAR—or a member of the "Big 6"—and are involved or planning to get involved, INPUT is the best source for market expertise and in-depth analysis to advance your strategic and market planning.

Use the enclosed form to order your copy of Subcontracting to Client Integrators today.

Call, Mail, or Fax Your Order to INPUT\*

## **About INPUT**

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry, which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services. Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

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#### International

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# **INPUT**

Reserve Your Space Now for INPUT's Conference on

# Worldwide Aspects of Systems Operations/ Outsourcing

#### **SEPTEMBER**

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- Get first-hand vendor and user insights into systems operations/outsourcing implementation
- Evaluate worldwide opportunities
- Develop market strategies
- Understand the forces driving and inhibiting outsourcing worldwide

## Let INPUT Help You Expand Your Opportunities in Systems Operations/Outsourcing

Don't miss INPUT's third annual systems operations conference on worldwide aspects of systems operations/outsourcing—two days of in-depth analysis of systems operations that will expand your opportunities—and your success.

Please reserve the following dates:

Tuesday and Wednesday
September 17 and 18, 1991
JW Marriott
Washington D.C.

Make your reservation before
August 19, 1991
and receive INPUT's 10% discount
off your attendance fee!

#### Detailed Market Analysis

INPUT's conference provides you with a careful, thorough analysis of the trends and opportunities in the systems operations/outsourcing market. But beyond generalities, the conference analyzes the specific issues that drive and define this dynamic market. You will hear first-hand from users who considered outsourcing their systems operations activities and decided against it. You will hear about the latest research on systems operations market trends. And you will learn about user activities in Europe and Japan.

Attend this conference, and reap the benefits of INPUT's incisive analysis of systems operations/outsourcing—all based on the most recent 1991 research data available. Get answers to the questions that will have positive effect on your SO/outsourcing decisions now:

- Why are corporations outsourcing information systems management activities, and what do they look for in an outsourcing vendor?
- What are the most current data on the size, growth rates, and five-year market projections for the systems operations and outsourcing markets?
- How is systems operations being accepted in Japan and Europe as a viable outsourcing alternative?
- How will the major market forces of downsizing, globalization, rapid technological change, and worldwide competition affect outsourcing and systems operations?

The answers to these questions, and many more, can affect your success now and over the long term. And they can reveal important new business opportunities. Don't miss this opportunity to make the right decisions and grow as your market grows.

#### Learn from Experience

There's no better teacher than experience. So in addition to presenting the most recent market data available, INPUT gathered together users who will explain their experiences selecting and working with outsourcing vendors, and a high-level vendor who will explain his company's experience implementing a large-scale SO contract. You will learn first-hand about the issues that are really impacting the systems operations/outsourcing market, and you will learn how to approach them effectively:

 What are the forces driving and inhibiting the outsourcing of systems operations and applications management? What has been the impact of the downsizing trend in the IS industry?

## INPUT °

Worldwide Aspects of Systems Operations/Outsourcing

September 17 & 18, 1991 JW Marriott, Washington, D.C.

| REGISTRATION FORM   |
|---|
| Sign Me Up! I want to attend INPUT's 1991 Systems Operations Conference.  |
| Name  |
| Title   |
| Company   |
| Address   |
| City/State/Zip  |
| Phone ()  |
| (Please duplicate this form for additional attendees and return the forms together)   |
| ATTENDANCE FEES:  |
|   |
| Fees for attendance vary depending on whether you are a client of INPUT's Systems Operations Program. Register now and receive a 10% discount.  |
| <ol> <li>SOP Clients may send two representatives at no charge. Additional representatives from the same client company may attend for \$345 each.</li> <li>Nonclients may send one representative for the regular price of \$795, and may send additional representatives for \$545 each.</li> <li>Early Reservations received before August 19, 1991, will be discounted 10%.</li> </ol>                              |
| MY ORDER:   |
| I am sending representative(s) from my company.   |
| ☐ Enclosed is, at a savings of 10 percent off the regular price. I'm reserving my place(s) <i>before</i> August 19, 1991.   |
| ☐ I'm registering after August 19, 1991, for the regular price of   |
| TERMS OF PAYMENT: (CHOOSE ONE)  |
| ☐ Enclosed is my check for \$ to cover the cost of my order.  |
| ☐ Charge \$ to my American Express card: Exp. date  |
| Card # Signature  |
| ☐ Bill my company for \$ on purchase order number   |
| PAYMENT AND CANCELLATION POLICY:  |
|   |
| Cancellations are subject to a \$50 cancellation fee. Cancellations must be received in writing. There will be no refunds for cancellations received after September 9, 1991. INPUT will consider purchase order numbers, company checks, or American Express as proper reservations. <i>Payment must be received prior to conference</i> . INPUT reserves the right to make changes to this conference without notice. |

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- What is the importance of business consulting in the decision to outsource systems operations?
- How do users determine the vendor best suited to satisfy their outsourcing requirements?
- What can users expect to find in Europe and Japan if they need to outsource their international operations?
- What factors are crucial to planning and implementing a large SO contract successfully?

#### Benefit from INPUT's Expertise

INPUT has been in the research and consulting business for 17 years and has been tracking the systems operations market since the mid-1980s. Leading vendors and users around the world have come to count on INPUT's careful research and intelligent analysis to uncover new opportunities and plan successful market strategies. Join them, and reap the benefits of INPUT's expertise. Use the enclosed order form to reserve your space at INPUT's conference today.

#### Preliminary Conference Agenda

#### September 17

9:20 Outsourcing/Systems Operations Overview—A presentation on the role of systems operations in the outsourcing movement

10:00 **The European Outsourcing Market**—A review of Western European developments in outsourcing/systems management by country and by leading vendors and trends

- 11:15 Large-Scale Systems Operations Considerations—A major SO vendor discusses the aspects of planning and executing a large contract
- 1:30 **Downsizing Impact on Systems Operations**—Analysis of the downsizing trend and its effect on the outsourcing/systems operations market
- 2:20 **Systems Operations Market**—An update of INPUT research on trends, factors, and forecast of the systems operations market
- 3:30 Outsourcing/Systems Operations in the Financial Industry—A systems operations client discusses the forces that support increasing use of SO by banking institutions
- 4:30 **Factors Inhibiting Outsourcing**—An industry executive explains why his organization declined to outsource its systems operations
- 5:45 Reception—12th-floor Presidential Suite

#### September 18

9:00 **The Japanese SO Perspective**—A guest speaker from Japan explains the market factors influencing SO buying decisions

11:00 Outsourcing Systems Operations in the Health Services Market—A health care industry executive examines the trends and problems of the industry regarding SO contracting

## 11:50 Review of INPUT's Systems Operations/Outsourcing Program

- 1:30 **The Canadian Market for SO**—A Canadian viewpoint on the driving forces and inhibiting factors for Canadian and U.S. vendors
- 2:20 **A Hybrid SO Arrangement**—A hybrid relationship using two SO vendors to meet evolving business conditions is discussed
- 3:30 **International Outsourcing Strategies**—A major vendor explores the alternatives and limitations of international operations

INPUT consultants will be available for individual discussions until 6:00 P.M.

(703) 847-6870, fax (703) 847-6872, or mail your registration to INPUT, 1953 Gallows Road, Suite 560, Vienna, VA 22182

Call

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#### CONFERENCE REGISTRATION FEES

Clients—INPUT Systems Operations Program clients may send two representatives as part of their service contract. Additional representatives of the same client company may attend the conference for the fee of \$345 each.

**Nonclients**—The first representative of a nonclient company may attend the conference for \$795. Additional attendees from the same nonclient company may attend for \$545.

#### PAYMENT AND CANCELLATION POLICY

Cancellations are subject to a \$50 cancellation fee. Cancellations must be in writing. There will be no refunds for cancellations after September 9, 1991. INPUT will consider purchase order numbers, company checks, and American Express as proper reservations. Payment must be received prior to the conference.

#### ACCOMMODATIONS

The JW Marriott Hotel is located at 1331 Pennsylvania Avenue N.W. in downtown Washington D.C. It is 10 minutes from National Airport and 30 minutes from Dulles International Airport. This hotel offers the finest amenities and accommodations and a special room rate for INPUT Systems Operations Conference attendees: \$140.00 single or double.

Please make your reservations directly with the hotel. Call (202) 393-2000; ask for the INPUT group rate. Room space can only be guaranteed until August 26, 1991, so book early!

INPUT reserves the right to make changes to this conference without notice.

SOCON 7/9

### Join INPUT For Two Days In October And Reap The Benefits For Years To Come

#### Gain A Competitive Advantage

Attending INPUT's 1991 U.S. Executive Conference gives you the opportunity to interact with industry experts and vendors to get first-hand information on what is really happening in the information services industry. INPUT's most recent market data, backed up by expert analysis of the trends and issues affecting information services, shows you how to

- Identify new areas of opportunity
- Understand the trends and issues affecting your target markets
- Anticipate, and plan for, future opportunities through the 1990s
- Focus your product and marketing strategies

#### Find Out The Key Trends Changing the Industry

Guest speakers—as well as INPUT senior nsultants—will address issues such as CASE and NIX implementation, systems management, and worldwide information services opportunities. Presentations will quantify and analyze:

Downsizing—Why is it different in the 1990s?

Electronic Commerce—How is it revolutionizing the way business is conducted in entire trading communities?

**Post-recession Market Growth**—What effect did the recession have on growth in various information services markets?

The Changing Client/Vendor Relationship— Relationships are becoming longer term and are increasingly being based on service provided, not on products. What are vendor and user perspectives on this change?

Open Systems—Fact or fiction?

The 1991 U.S. Executive Conference—INPUT's annual assessment of the information services industry—provides information services vendors and users with the information needed to formulate viable market strategies that will impact business throughout the 1990s. In an industry where far-reaching trends—such as market globalization and mergers and alliances—are affecting the way business is conducted, preparing for these changes now is essential to staying competitive.

#### Be one of the industry leaders

Count on INPUT's 17 years of experience—and incisive industry analysis—to uncover promising opportunities and successful marketing strategies. Join INPUT for two days and reap the benefits for years to come. If you haven't reserved your space at INPUT's 1991 U.S. Executive Conference, call (415) 961-3300, today.



Please confirm my registration for INPUT's 1991

U.S. Executive Conference, October 7 & 8, San Francisco, CA

| Company   | <ul><li>Yes, I am registering for this conference. Bill my company \$895 on</li><li>PO #</li></ul>                       |
|-----------|--|
| Title     | ☐ I am registering as an additional attendee. Bill my company \$395 on PO#   |
| Address   | I am registering as an INPUT subscriber at no charge. (Max 2)  |
| State Sip | ☐ Have a representative call me.  \$50 cancellation fee. No refunds after 9/30/91.                                       |
| Phone     | Purchase order numbers, company checks, and American Express are accepted. Payment must be received prior to conference. |

Risks and Rewards

Expanding Vendor Responsibilities—

Foundation for Trade

• Electronic Commerce: A New

**Downsizing** 

Join Industry Experts and INPUT's Senior Consultants As They Discuss Fundamental Trends for the 1990s:

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We look forward to seeing you there...

REMINDER!

Join Us at the INPUT 1991 U.S. Executive Conference October 7 & 8, 1991 Fairmont Hotel, San Francisco, CA

(Don't be left out of the future!)



# INPUT's 1991 U.S. Executive Conference October 7 & 8, 1991

Join Industry Experts and INPUT's Senior Consultants As They Discuss Fundamental Trends for the 1990s:

- Downsizing
- Electronic Commerce: A New Foundation for Trade
- Expanding Vendor Responsibilities— Risks and Rewards

Discounted
air fares
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# Join INPUT For Two Days In October Aron Reap The Benefits For Years To Come

The 1991 U.S. Executive Conference—INPUT's annual assessment of the information services industry—provides information services vendors and users with the information they need to formulate viable market strategies that will impact their businesses throughout the 1990s. In an industry where far-reaching trends—such as market globalization and mergers and alliances—are affecting the way business is conducted, preparing for these changes now is essential to staying competitive.

Please reserve the following dates:

Monday and Tuesday
October 7 and 8, 1991
Fairmont Hotel, San Francisco

#### Key Trends Changing the Industry

Guest speakers—as well as INPUT senior consultants—will address issues such as CASE and UNIX implementation, systems management, and worldwide information services opportunities. They will also focus on issues that, according to INPUT, will drive significant change in the industry over the next five years. Presentations will quantify and analyze:

**Downsizing**—Why is it different in the 1990s?

Electronic Commerce—How is it revolutionizing the way business is conducted in entire trading communities?

**Post-recession Market Growth—**What effect did the recession have on growth in various information services markets?

The Changing Client/Vendor Relationship— Relationships are becoming longer term and are increasingly being based on service provided, not on products. What are vendor and user perspectives on this change?

Open Systems—Fact or fiction?

#### Competitve Advantage

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- Identify new areas of opportunity
- Understand the trends and issues affecting your target markets
- Anticipate, and plan for, future opportunities through the 1990s
- Focus your product and marketing strategies

Be one of the industry leaders who have come to count on INPUT's 17 years of experience—and incisive industry analysis—to uncover promising opportunities and successful marketing strategies. Join INPUT for two days and reap the benefits for years to come. Reserve your space at INPUT's 1991 U.S. Executive Conference today.

# INPUT 1991 U.S. Executive Conference

October 7 & 8 Fairmont Hotel, San Francisco, California Join us for a reception
Sunday evening
October 6
5:30 p.m.-9:00 p.m.
in the Fountain Room
of the Fairmont Hotel.

#### REGISTRATION FORM

| Name  |   |
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| (Ple  | ease duplicate this form for additional attendees and return the forms together)  |
| ATTENDANCE FE   | ES:   |
|   | nce vary depending on whether you are a client of INPUT's Market Analysis ation Systems Program, or Vendor Analysis Program. Register now and scount.   |
| repres  | ISP, and VAP Clients may send two representatives at no charge. Additional entatives or subscribers to other INPUT programs may attend for \$395 each.  |
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| send a 3. Early  MY ORDER:  I am send  Enclose reserve  I'm reg  TERMS OF PAYM  Charge Card #   | ing representatives for \$395 each.  Reservations received before September 1, 1991, will be discounted 10%.  ing representative(s) from my company.  sed is, at a savings of 10 percent off the regular price. I'm ing my place(s) before September 1, 1991.  gistering after September 1, 1991, for the regular price of  ENT: (CHOOSE ONE)  sed is my check for \$ to cover the cost of my order.  |

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# 1991 U.S. Executive Conference REVISED AGENDA

#### SUNDAY, OCTOBER 6

5:30 p.m. - 9.00 p.m Reception—Hosted by R. Dennis Wayson and Nancy A. Hill, INPUT, in the Fountain Room of the Fairmont Hotel.

#### MONDAY, OCTOBER 7

- 9:00 Worldwide Information Services Opportunities—Peter A. Cunningham, President, INPUT, speaks about the global directions of the information services market.
- 10:30 Partnerships and Alliances—Role in the 1990s—Victor Millar, President, PSF Management International, addresses the vendors' responsibilities resulting from strategic alliances.
- 1:00 U.S. Information Services Market Outlook, 1991-1996—Douglas H. Tayler, Vice President, INPUT, presents INPUT's 1991-1996 forecast for information services, which includes discussion of recessionary impacts, shifting opportunities, and the general business outlook for the first half of the decade.
- 2:00 Beyond CASE—Application Development Barriers and Opportunities—

Thomas J. O'Flaherty, Vice President, INPUT, discusses INPUT's research, which has identified key technical and non-technical drivers in applications development. Tom will also review the variables affecting the size of the CASE market and growth of CASE use.

- 3:15 Downsizing—Evolution of Revolution—
  R. Dennis Wayson, Vice President, INPUT, examines downsizing and its impact on the information services industry.
- 4:00 Downsizing—A Case Study—Paul Ricker, Vice President Information Systems for Heileman Brewery, presents an example of successfully downsizing the information systems infrastructure of a major corporation.



#### TUESDAY, OCTOBER 8

- 8:15 Electronic Commerce: The New Foundation for Trade—Douglas H. Tayler describes how the electronification of business relationships is changing the structure of industry.
- 9:00 User Expectations of Vendors in the 1990s—The CIO of a major corporation presents a challenge to information services vendors for the 1990s.
- 10:30 Vendor Responsibilities in the 1990s—Barry Sullivan, Director, Corporate Marketing for EDS, discusses the quality aspects of the vendor/client relationship in the 1990s.
- 11:30 Panel of the guest speakers chaired by R. Dennis Wayson.
- 1:30 Outsourcing—Future Markets— John Frank, President, INPUT, INC., discusses the outsourcing market and what it will look like in 1996.
- 3:00 What Is an Open System? The Customers Speak—Thomas J. O'Flaherty. The trade press, and other media are full of vendor pronouncements—many conflicting—of what an open system is. INPUT's research findings may shock some vendors. Every vendor—and user—will want to factor these findings into their plans.
- 3:45 Workshops—INPUT senior staff discusses the detailed 1991-1996 forecasts.

Session A: Electronic Commerce

Session B: Software Products Markets

Session C: Services Markets

Call, fax, or mail your order to any INPUT office listed on the back of this brochure



#### 1991 U.S. Executive Conference

October 7 & 8 • Fairmont Hotel • San Francisco, CA

#### CONFERENCE REGISTRATION FEES

Clients—INPUT MAP, ISP, and VAP clients may send two representatives as part of their service contract. Additional representatives or subscribers to other INPUT programs may attend the conference for the fee of \$395 each.

Nonclients—The first representative of a nonclient company may attend the conference for \$895. Additional attendees from the same nonclient company may attend for \$395.

#### PAYMENT AND CANCELLATION POLICY

Cancellations are subject to a \$50 cancellation fee. Cancellations must be in writing. There will be no refunds for cancellations after September 30, 1991. INPUT will consider purchase order numbers, company checks, and American Express as proper reservations. Payment must be received prior to the conference.

INPUT reserves the right to make changes to this conference without notice.

#### **ACCOMMODATIONS**

The historic Fairmont Hotel is located atop Nob Hill, San Francisco. The Fairmont has easy access to Fisherman's Wharf, Chinatown, and Union Square shopping, and it is 25 minutes from San Francisco International Airport.

Please make your reservations directly with the hotel. Call (415) 722-5000, or toll free 1-(800) 527-4727. Be sure to ask for the INPUT conference rate.

\$155 single or double—Main Bldg. \$185 single or double—Tower

Room space can only be guaranteed until September 10, 1991, so book early! Reservations after that date are subject to availability.

#### GROUP AIR FARES

United Airlines, in association with the Travel Center, has made available the following discounts to all INPUT Executive Conference attendees:

- 45% OFF FULL COACH FARE (with a minimum of 7 days' advance booking)
- 5% OFF ANY PUBLISHED FARE (all rules concerning that fare apply)

If you wish to utilize the discounts we have arranged for you, please call:

TRAVEL CENTER-1-800-544-1822

Any agent will be able to help you. Please state that you want the discount that applies to the INPUT U.S. Executive Conference.

The travel dates that the discounts are valid for are

10/3/91 to 10/11/91

Travel Center will either Fed-Ex or mail the tickets to you at your request.

# **INPUT**

Reserve Your Space Now for INPUT's Conference on

# Worldwide Aspects of Systems Operations/ Outsourcing

# SEPTEMBER S M T W T F S 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

- Get first-hand vendor and user insights into systems operations/outsourcing implementation
- Evaluate worldwide opportunities
- Develop market strategies
- Understand the forces driving and inhibiting outsourcing worldwide

## Let INPUT Help You Expand Your Opportunities in Systems Operations/Outsourcing

Don't miss INPUT's third annual systems operations conference on worldwide aspects of systems operations/outsourcing—two days of in-depth analysis of systems operations that will expand your opportunities—and your success.

Please reserve the following dates:

Tuesday and Wednesday
September 17 and 18, 1991
JW Marriott
Washington D.C.

Make your reservation before
August 19, 1991
and receive INPUT's 10% discount
off your attendance fee!

#### Detailed Market Analysis

INPUT's conference provides you with a careful, thorough analysis of the trends and opportunities in the systems operations/outsourcing market. But beyond generalities, the conference analyzes the specific issues that drive and define this dynamic market. You will hear first-hand from users who considered outsourcing their systems operations activities and decided against it. You will hear about the latest research on systems operations market trends. And you will learn about user activities in Europe and Japan.

Attend this conference, and reap the benefits of INPUT's incisive analysis of systems operations/outsourcing—all based on the most recent 1991 research data available. Get answers to the questions that will have positive effect on your SO/outsourcing decisions now:

- Why are corporations outsourcing information systems management activities, and what do they look for in an outsourcing vendor?
- What are the most current data on the size, growth rates, and five-year market projections for the systems operations and outsourcing markets?
- How is systems operations being accepted in Japan and Europe as a viable outsourcing alternative?
- How will the major market forces of downsizing, globalization, rapid technological change, and worldwide competition affect outsourcing and systems operations?

The answers to these questions, and many more, can affect your success now and over the long term. And they can reveal important new business opportunities. Don't miss this opportunity to make the right decisions and grow as your market grows.

#### Learn from Experience

There's no better teacher than experience. So in addition to presenting the most recent market data available, INPUT gathered together users who will explain their experiences selecting and working with outsourcing vendors, and a high-level vendor who will explain his company's experience implementing a large-scale SO contract. You will learn first-hand about the issues that are really impacting the systems operations/outsourcing market, and you will learn how to approach them effectively:

 What are the forces driving and inhibiting the outsourcing of systems operations and applications management? What has been the impact of the downsizing trend in the IS industry?

# INPUT °

Worldwide Aspects of Systems Operations/Outsourcing September 17 & 18, 1991 JW Marriott, Washington, D.C.

| REGISTRATION FORM   |
|---|
| Sign Me Up! I want to attend INPUT's 1991 Systems Operations Conference.  |
| Name  |
| Title   |
| Company   |
| Address   |
| City/State/Zip  |
| Phone ()  |
| (Please duplicate this form for additional attendees and return the forms together)   |
| ATTENDANCE FEES:  |
| Fees for attendance vary depending on whether you are a client of INPUT's Systems Operations Program. Register now and receive a 10% discount.  |
| <ol> <li>SOP Clients may send two representatives at no charge. Additional representatives from the same client company may attend for \$345 each.</li> <li>Nonclients may send one representative for the regular price of \$795, and may send additional representatives for \$545 each.</li> <li>Early Reservations received before August 19, 1991, will be discounted 10%.</li> </ol>                              |
| MY ORDER:   |
| I am sending representative(s) from my company.   |
| Enclosed is, at a savings of 10 percent off the regular price. I'm reserving my place(s) <i>before</i> August 19, 1991.   |
| ☐ I'm registering after August 19, 1991, for the regular price of   |
| TERMS OF PAYMENT: (CHOOSE ONE)  |
| ☐ Enclosed is my check for \$ to cover the cost of my order.  |
| ☐ Charge \$ to my American Express card: Exp. date  |
| Card # Signature  |
| ☐ Bill my company for \$ on purchase order number   |
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INPUT • 1953 Gallows Rd. • Ste. 560 • Vienna, VA 22182 • Tel. (703) 847-6870 • Fax (703) 847-6872



- What is the importance of business consulting in the decision to outsource systems operations?
- How do users determine the vendor best suited to satisfy their outsourcing requirements?
- What can users expect to find in Europe and Japan if they need to outsource their international operations?
- What factors are crucial to planning and implementing a large SO contract successfully?

### Benefit from INPUT's Expertise

INPUT has been in the research and consulting business for 17 years and has been tracking the systems operations market since the mid-1980s. Leading vendors and users around the world have come to count on INPUT's careful research and intelligent analysis to uncover new opportunities and plan successful market strategies. Join them, and reap the benefits of INPUT's expertise. Use the enclosed order form to reserve your space at INPUT's conference today.

# Preliminary Conference Agenda

### September 17

9:20 Outsourcing/Systems Operations Overview—A presentation on the role of systems operations in the outsourcing movement

10:00 **The European Outsourcing Market**—A review of Western European developments in outsourcing/systems management by country and by leading vendors and trends

- 11:15 Large-Scale Systems Operations Considerations—A major SO vendor discusses the aspects of planning and executing a large contract
- 1:30 **Downsizing Impact on Systems Operations**—Analysis of the downsizing trend and its effect on the outsourcing/systems operations market
- 2:20 **Systems Operations Market**—An update of INPUT research on trends, factors, and forecast of the systems operations market
- 3:30 Outsourcing/Systems Operations in the Financial Industry—A systems operations client discusses the forces that support increasing use of SO by banking institutions
- 4:30 **Factors Inhibiting Outsourcing**—An industry executive explains why his organization declined to outsource its systems operations
- 5:45 Reception—12th-floor Presidential Suite

### September 18

9:00 **The Japanese SO Perspective**—A guest speaker from Japan explains the market factors influencing SO buying decisions

11:00 Outsourcing Systems Operations in the Health Services Market—A health care industry executive examines the trends and problems of the industry regarding SO contracting

# 11:50 Review of INPUT's Systems Operations/Outsourcing Program

- 1:30 **The Canadian Market for SO**—A Canadian viewpoint on the driving forces and inhibiting factors for Canadian and U.S. vendors
- 2:20 **A Hybrid SO Arrangement**—A hybrid relationship using two SO vendors to meet evolving business conditions is discussed
- 3:30 International Outsourcing Strategies—A major vendor explores the alternatives and limitations of international operations

INPUT consultants will be available for individual discussions until 6:00 P.M.

until (703) 847-6870, fax (703) 847-6872, or mail your registration to INPUT, 1953 Gallows Road, Suite 560, Vienna, VA 22182

# **About INPUT**

INPUT provides planning information, analysis, and recommendations for the information technology industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management in making informed decisions.

Subscription services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services. INPUT specializes in the software and services industry which includes software products, systems operations, processing services, network services, systems integration, professional services, turnkey systems, and customer services.

Particular areas of expertise include CASE analysis, information systems planning, and outsourcing.

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialization. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

# Worldwide Aspects of Systems Operations/Outsourcing September 17 & 18, 1991 • JW Marriott • Washington, D.C.

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#### **ACCOMMODATIONS**

The JW Marriott Hotel is located at 1331 Pennsylvania Avenue N.W. in downtown Washington D.C. It is 10 minutes from National Airport and 30 minutes from Dulles International Airport. This hotel offers the finest amenities and accommodations and a special room rate for INPUT Systems Operations Conference attendees: \$140.00 single or double.

Please make your reservations directly with the hotel. Call (202) 393-2000; ask for the INPUT group rate. Room space can only be guaranteed until August 26, 1991, so book early!

INPUT reserves the right to make changes to this conference without notice.

# **INPUT**

E R Two Days Is All It Takes To Put You On The Road To Success INPUT's 1991 U.S. Executive Conference October 7 &

# The information services industry is transforming rapidly.

Throughout the 1990s, globalization of markets, evolving technologies, mergers and alliances, and other trends will affect the way both vendors and users need to do business to stay competitive. Preparing for these changes, not reacting to them, will become increasingly important as these trends make information services delivery more complex. Careful, informed market planning is essential to success.

### Key Trends through 1996

INPUT's 1991 Executive Conference provides users and vendors with the information they need to formulate viable market strategies. Drawing from the most up-to-date market research and analysis available, INPUT's conference will focus on the following significant issues:

MARKET FORECASTS FOR 1991-1996—INPUT's consultants discuss for the first time their 1991-1996 market forecasts for the U.S. information services market as a whole and for each of its delivery modes.

**WORLDWIDE OPPORTUNITIES**—The U.S. market forecasts will be contrasted to the worldwide information services opportunities.

PARTNERSHIPS/ALLIANCES—INPUT will discuss the issues that define the increasingly important trend towards partnerships and alliances in information services delivery.

**VENDOR RESPONSIBILITIES/USER EXPECTATIONS**—Two guest speakers— a vendor organization CIO and a user organization senior executive—will present first-hand analysis of these issues and how they will unfold through the 1990s. A question and answer panel discussion with these speakers will provide insights into how vendors and users will need to adapt to establish winning relationships.

In addition to the above, broad-based issues, INPUT's conference discusses four key trends that are beginning to have a far-reaching impact on information services delivery:

- UNIX
- Downsizing
- CASE
- Electronic Commerce

### **Conference Features**

- ✓ Presentations on the latest trends and developments in the information services industry given by INPUT's most experienced executives
- ✓ INPUT's premier presentation of the overall 1991-1996 forecasts for the U.S. information services industry and its delivery modes
- ✓ Small-group sessions led by INPUT's forecasters designed to allow attendees to ask questions focused on their specific problems and interests
- Guest speakers from prominent vendor and user organizations

### **Conference Benefits**

- ✓ Helps you plan for the changes and growth in information services through the 1990s
- ✓ Helps you identify new areas of opportunity
- ✓ Identifies significant trends and issues in your target markets
- ✓ Helps you focus your product and marketing strategies

INPUT's 1991 Executive Conference is two days packed with the information you must have to win in the 1990s. Successful companies anticipate changes, not react to them. To do this effectively, you must have the kind of solid market information INPUT offers. Two days is all it takes to put you on the road to success. Don't pass them up! Reserve your space at INPUT's 1991 Executive Conference today!

# **INPUT**

# U.S. CLIENT CONFERENCE

Fairmont Hotel, atop Nob Hill, San Francisco October 6-8, 1991

The conference will cover the following topics:

- Worldwide Opportunities
- Expectations of Vendors
- Changing Role of the IS Vendor
- Electronic Commerce—IT Impact on Sectors of the Economy
- INPUT Market Outlooks, 1991-1996
- Software Products
- Systems Integration
- Systems Operations
- Professional Services
- Processing Services
- Network Services

In addition to INPUT's 1991-1996 outlook, the conference will feature keynote presentations on:

- The Worldwide IS Markets Peter Cunningham
- User Expectations of Vendors in the 1990s Speaker to be announced
- Partnerships and Alliances—Role in the 1990s Speaker to be announced

Please register with INPUT early by completing the form attached and returning it to us by September 1st, 1991. We will then send you confirmation of your reservation and specific details.



# INPUT U.S. CONFERENCE

October 6, 7, & 8 Fairmont Hotel, San Francisco, California

### REGISTRATION FORM

| <b>Sign Me Up!</b> I want to attend INPUT's 1991 U.S. Client Conference, where I'll learn the latest developments in the information services industry!   |
|---|
| Name  |
| Title   |
| Company   |
| Address   |
| City/State/Zip  |
| Phone ()  |
| (Please duplicate this form for additional attendees and return the forms together)   |
| ATTENDANCE FEES:  |
| Fees for attendance vary depending on whether you are a client of INPUT's Market Analysis Program, Information Systems Program, or Vendor Analysis Program. Register now and receive a 10% discount.  |
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| ☐ Enclosed is, at a savings of 10 percent off the regular price. I'm reserving my place(s) <i>before</i> September 1, 1991.   |
| ☐ I'm ordering after September 1, 1991, for the regular price of  |
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INPUT reserves the right to make changes to this conference without notice.



# 1991 Annual Executive Conference

October 6, 7, & 8 Fairmont Hotel, San Francisco, California

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# 1991 Annual Executive Conference Preliminary Agenda

### Sunday, October 6

5:30 p.m.-9:00 p.m. Reception — Hosts: Denny Wayson and Nancy Hill

### Monday, October 7

- 8:45 Worldwide Information Systems Opportunities— Peter Cunningham, President, INPUT
- 10:30 Partnerships and Alliances—Role in the 1990s—Vic Milar
- 11:30 Systems Management—Denny Wayson, Vice President, INPUT
  - 1:30 U.S. Information Services Market Outlook, 1991-1996— Doug Tayler, Vice President, INPUT
- 2:15 CASE—Outlook, 1991-1996—Tom O'Flaherty, Vice President, INPUT
- 3:30 Electronic Commerce: The New Foundation for Trade— Doug Tayler
- 4:15 Downsizing—Impacts on Information Services Vendors— Denny Wayson
- 6:30 Reception and Dinner

### Tuesday, October 8

- 8:15 Open Systems & UNIX—Implications for the 1990s— Tom O'Flaherty
- 9:00 User Expectations of Vendors in the 1990s—CIO Guest Speaker
- 10:30 Vendor Responsibilities in the 1990s—Barry Sullivan, Director of Corporate Marketing, EDS
- 11:30 Panel Discussion

### 1991-1996 MARKETS

- 1:30 CONCURRENT SESSIONS
  - Session A—Systems Operations Markets Processing Services
    Session B—Federal Market
- 2:45 CONCURRENT SESSIONS
  - Session A—Systems Integration Professional Services Markets
  - Session B—Network Services
- 4:00 CONCURRENT SESSIONS
  - Session A—Software Products & Turnkey Markets
  - Session B—Customer Services Market

**INPUT** 

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\$155 single or double—Main Building \$185 single or double—Tower

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n the coming years, federal government agencies will become increasingly dependent on their information systems, which will lead to enhanced sales opportunities..."

- Discover how to maximize your effectiveness in the federal information services market.
- Learn the views of senior federal officials on upcoming agency needs.
- Find out market size and growth expectations—and how the recession and the war are affecting federal spending.

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 JUNE

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 1991 Federal Information
 5,6,7,8

 Systems and Services Conference!
 12,03,14,15

 19,20,21,22

 June 13 & 14
 23,24,25,26,27,28,29

 Tyson's Corner Marriott
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 Vienna, VA

12, Mc

### 1991 INPUT Conference Schedule—U.S.

June 13 & 14

Federal Information Systems and Services
Conference
Tyson's Corner Marriott, VA

July 24 & 25

Systems Integration Conference
JW Marriott, Washington, D.C.

Sept. 17 & 18

Systems Operations Conference
JW Marriott, Washington, D.C.

Oct. 6, 7, & 8

1991 U.S. Information Services Market Analysis
Conference
Fairmont, San Francisco

### Let the experts tell you how to succeed

A Renewed Federal IRM Market

on't miss this conference! If you're a vendor interested in assessing the overall sales prospects in various federal market categories, or if you're interested in improving your teaming prospects through networking, reserve time today to attend this important INPUT conference. This is your chance to learn from the experts!

### JUNE 13 - THURSDAY

### **CIM Directions**

Paul A. Strassman
Director of Defense Information
Department of Defense

### **Procurement Integrity for Contractors**

Allan V. Burman, Administrator Office of Federal Procurement Policy Office of Management and Budget

### **Modernizing Treasury Information Systems**

Stephen W. Broadbent, Deputy Assistant Secretary, Treasury Department

# Approaching the Federal Consulting Market

Dr. Paul Oliver, Vice President Booz, Allen & Hamilton

### Logistics Initiatives in the Air Force

Colonel Michael W. Hovastak, Chief Logistics Information Systems U.S. Air Force

# Information Systems Modernization at the National Weather Service

Dr. Elbert W. Friday, Jr. Director, National Weather Service

### Federal Market Forecast, 1991-1996

John E. Frank, President INPUT, INC.

### JUNE 14 - FRIDAY

### New Directions in VA Information Systems Robert Woods, Principal Deputy Assistant

Secretary for IRM, Department of Veterans
Affairs

# Federal/State Information Systems Modernization

Joseph Leo, Deputy Administrator (Management), Food and Nutrition Service Department of Agriculture

### **Maximizing Federal IRM Effectiveness**

Thomas J. Buckholtz, Commissioner Information Resources Management Service General Services Administration

### Contractor Weaknesses in Federal Protest Actions

Stephen M. Daniels, Administrative Judge GSA Board of Contract Appeals

### Approaching the Federal Software Market

Dr. Philip Kiviat, Vice President Chartway Technologies

### FISSP Dialogue

James F. Kerrigan, Vice President INPUT, INC.

Mail or fax your registration to INPUT, or call Barbara Fisher,
Conference Coordinator, today!

expiration date \_\_\_\_\_/\_\_\_

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### REGISTRATION FORM

| YES! Sign Me Up! I need to learn the latest about what's happen information services market. I will attend INPUT's 1991 Federal Info                           | ening—and how to succeed—in the federal   |
|--|---|
| A Renewed Federal IRM Market—June 13 & 14, 1991, Tyson's Corner  |   |
| Yes, I am registering for this conference. There will be attem<br>I understand that I will be billed \$750 for each of the first 2 attended at the conference. |   |
| ☐ Yes, I am registering for this conference. There will be attendees at no INPUT FISSP subscriber and can send 2 attendees at no                               |   |
| ☐ Please have an INPUT representative call me.   | FOR HOTEL RESERVATIONS, call the Tyson's Corner Marriott, (703) 734-3200, and ask for the |
| Company  | INPUT conference rate.  |
| Name   | TERMS OF PAYMENT— Payment in full is due prior to conference.                             |
| Title  | Enclosed is my check in the amount of  to cover the cost of my registration.              |
| Address  | ☐ Please invoice my company on purchase order   |
| City State Zip   | number in the amount of \$  |
| Phone  | ☐ Charge it to my American Express, number:   |
| Signature (required for American Express charge)   | expination data   |

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Here's Your Chance to Get Ahead

# INPUT's Conference On The Role Of Systems Integration In The Outsourcing Revolution

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> July 24 & 25, 1991 JW Marriott Washington, D.C.

# It Will Expand Your Opportunities in the Systems Integration Market

Don't miss INPUT's fourth annual systems integration conference—The Role of Systems Integration in the Outsourcing Revolution—two days of in-depth analysis of the fastest growing information services market today.

Please reserve the following dates:

Wednesday and Thursday July 24 and 25, 1991

JW Marriott Hotel on Pennsylvania Avenue in Washington D.C.

And if you make your reservations before Monday,
June 24, 1991, you will receive INPUT's 10 percent discount on your attendance fee!

The best research and analysis available, at 10 percent off.

Over the last few years, user organizations have expanded their information services outsourcing activities beyond systems operations to include systems development and applications management. This expansion of the role of outsourcing has resulted in several new trends and opportunities you need to understand in order to stay ahead of the competition—and succeed.

INPUT's conference examines these trends in depth, giving you an up-to-date assessment of the outsourcing phenomenon, trends in outsourcing systems management activities, and what's happening in systems integration in general.

# Beyond the Big Picture

INPUT goes beyond just discussing general issues, and delves into the heart of the systems integration arena. Among other essential information, you will hear users who decided to manage their own systems integration projects discuss using information services vendors as subcontractors. You will get the latest research on systems integration technology trends. And you will learn about vendor opportunities in user-managed SI projects.

Essentially, this INPUT conference gives attendees a careful analysis of the trends, changes, and opportunities in the systems integration market today. Attending this conference is your opportunity to reap the benefits of the latest research and analysis of these subjects—all based on the most upto-date 1991 data available. You will get answers to the questions that can affect your SI decisions **now**:

- Why are corporations outsourcing information systems management activities, and what do they look for in an outsourcing vendor?
- What are the very latest data on the size, growth rates, and five-year projections for the systems integration and outsourcing markets?
- What is the secondary market for information services and products firms as suppliers to corporations that are managing their own systems integration projects?
- What are the technologies that corporations in the largest systems integration markets are most likely to implement? And, will they use integrators to implement them?
- How will the major market forces of globalization, rapid change and worldwide competition affect outsourcing and systems integration?

# **INPUT** Conference

# The Role of Systems Integration in the **Outsourcing Revolution**

July 24 & 25, 1991 JW Marriott, Washington, D.C.

| REGISTRATION FORM  |
|--|
| <b>Sign Me Up!</b> I want to attend INPUT's two-day conference on <b>The Role of Systems Integration in the Outsourcing Revolution</b> , where I'll get the latest data on—and the best analysis of—this market available today! |
| Name   |
| Title  |
| Company  |
| Address  |
| City/State/Zip   |
| Phone (  |
| (Please duplicate this form for additional attendees and return the forms together)  |
| ATTENDANCE FEES:   |
| Fees for attendance vary depending on whether you are a client of INPUT's Systems Integration Program, and when you register.  |
| 1. SIP Clients may send two representatives at no charge. Additional representatives   |
| may attend for \$345 each.  2. Nonclients may send one representative for the regular price of \$795, and may  |
| send additional representatives for \$545 each.  |
| 3. Early Reservations received before June 24, 1991, will be discounted by 10%.  |
| MY ORDER:  |
| I am sending representative(s) from my company.  |
| ☐ Enclosed is, at a savings of 10 percent off the regular price. I'm reserving my place(s) before June 24, 1991.   |
| ☐ I'm ordering after June 24, 1991, for the regular price of   |
| TERMS OF PAYMENT: (CHOOSE ONE)   |
| ☐ Enclosed is my check for \$ to cover the cost of my order.   |
| ☐ Charge \$ to my American Express card: Exp. date   |
| Card #Signature  |
| ☐ Bill my company for \$ on purchase order number  |
| PAYMENT AND CANCELLATION POLICY:   |
| Cancellations are subject to a \$50 cancellation fee. Cancellations must be received in writing. There will  |
| be no refunds for cancellations received after July 16, 1991. INPUT will consider purchase order numbers, company checks, or American Express as proper reservations. Payment must be received prior to conference.              |
| INPUT reserves the right to make changes to this conference without notice.  |



And you will learn more about the general market trends in a rapidly changing arena that has the potential to provide you with exciting new business opportunities.

# Learn from Users' Experience

But that's not all. In addition to presenting you with its most recent research, INPUT had also gathered together some users who will share their firsthand experience selecting and working with integrators—because INPUT knows that one of the best ways of truly understanding how the market works and identifying market trends and issues is to have users share their real experiences. So we went the extra step and got several users to give you the benefits of their experience.

### You will learn about:

- The forces driving and inhibiting outsourcing of systems development, systems operations and applications management
- The importance of business consulting in the decision to outsource systems development
- Using information services and products firms as subcontractors or suppliers when you manage your own projects
- Selecting a systems integrator to introduce new technology

And more, covering the questions users and vendors are asking about outsourcing systems management.

# Reap the Benefits of Expertise

This is a conference for vendors who cannot afford to have anything but the best market intelligence and informed analysis of systems integration and outsourcing available today.

INPUT has been in the research and consulting business for 17 years and has been tracking the systems integration business statistically since the mid-1980s. This conference is an opportunity for you to reap the benefits of our expertise.

Why not put the results of our research to work for your company? Use the enclosed form to reserve your place at INPUT's Systems Integration Conference today.

# Who Should Attend

- Marketing and operating executives at Systems Integration vendor companies
- Systems Integration planning management
- Information Services firms considering SI participation
- ◆ Executives of firms considering using SI
- ♦ Computer equipment providers
- ♦ Professional Services firms
- ♦ Systems Integration companies
- ◆ Processing Services firms

Call (703) 847-6870, fax (703) 847-6872, or mail your registration to INPUT, 1953 Gallows Road, Suite 560, Vienna, VA 22182

### About INPUT and Systems Integration

In 1984, INPUT foresaw the growing need for Systems Integration planning data and we included it in our Market Analysis Program (MAP). Since then Systems Integration has become the fastest growing opportunity in the information services markets.

In 1987, INPUT established a separate Systems Integration Program (SIP) to handle the special needs of clients that were focused on the SI market. This research and consulting service is extremely comprehensive—we believe the best in the business—and it is coordinated with INPUT's other information services research and consulting programs. Our service is subscribed to by most of the leading SI vendors in the U.S. We have a similar service in Europe and have published forecasts for the remaining areas of the world, as well.

Systems Integration and the Outsourcing Revolution July 24 & 25, 1991 • JW Marriott Hotel • Washington, D.C.

#### CONFERENCE REGISTRATION FEES

Clients—INPUT Systems Integration clients may send two representatives as part of their service contract.

Additional client personnel may attend the conference at the fee of \$345 each.

Nonclients—The first representative of a nonclient company may attend the conference for \$795. Additional attendees from the same nonclient company may attend for \$545.

### PAYMENT AND CANCELLATION POLICY

Cancellations are subject to a \$50 cancellation fee. Cancellations must be in writing. There will be no refunds for cancellations after July 16, 1991. INPUT will consider purchase order numbers, company checks, and American Express as proper reservations. Payment must be received prior to conference.

#### ACCOMMODATIONS

The JW Marriott Hotel is located at 1331 Pennsylvania Ave. N.W. in downtown Washington, D.C. It is 10 minutes from National Airport and 30 minutes from Dulles International Airport. This hotel offers the finest amenities and accommodations and a special room rate for INPUT Systems Integration Conference attendees: \$105.00 single or double.

Please make your reservations directly with the hotel. Call (202) 393-2000; ask for the INPUT group rate. Room space can only be guaranteed until July 2, 1991, so book early!

INPUT reserves the right to make changes to this conference without notice.

### P R E L I M I N A R Y A G E N D A

Systems Integration Conference July 24 and 25, 1991 Washington, D.C.

# The Role of Systems Integration in the Outsourcing Revolution

### Wednesday, July 24

| 8:00        | Registration and Continental Breakfast   |  |  |
|-------------|--|--|--|
| 8:45        | Welcome and Conference Introduction  |  |  |
| 9:00-10:00  | Outsourcing Information Systems—A strategic assessment of the outsourcing movement.  |  |  |
| 10:00       | Break  |  |  |
| 10:30-11:30 | The Evolving Role of Systems Management—An INPUT presentation on outsourcing of systems development, application maintenance, and systems operations.                |  |  |
| 11:30-12:30 | Systems Management—A user's perspective of the forces driving and inhibiting outsourcing management of IS activities.  |  |  |
| 12:30-1:45  | Lunch  |  |  |
| 1:45-2:45   | Systems Integration Market—An update of INPUT research on the systems integration market.  |  |  |
| 2:45        | Break  |  |  |
| 3:00-4:00   | Business Consulting—A user discussion of the role of business consulting in decisions to outsource IS management activities.   |  |  |
| 4:00-5:00   | The Secondary Systems Integration Market—INPUT research of vendor opportunities as suppliers in user-managed SI projects.  |  |  |
| 5:15-7:00   | Reception—Please join us in the 12th floor Presidential Suite overlooking the Washington monuments for an opportunity to network with your peers in the SI business. |  |  |



Systems Integration Conference July 24 and 25, 1991 Washington, D.C.

# The Role of Systems Integration in the Outsourcing Revolution

### Thursday, July 25

| 8:00        | Continental Breakfast  |
|-------------|--|
| 9:00-10:00  | The User as SI Prime Contractor—A user presentation of how an internal SI program is managed, including vendor and subcontractor identification and management.            |
| 10:00       | Break  |
| 10:30-11:30 | SI Technology Trends—INPUT's summary of research on user plans to incorporate new technologies in future systems.  |
| 11:30-12:30 | Using Systems Integration to Introduce New Technology—A user presentation of the benefits of using a systems integrator to develop an IS system using advanced technology. |
| 12:30-1:45  | Lunch  |
| 1:45-2:30   | State Government Outsourcing Trends—Research of information services issues and trends in the state government market.   |
| 2:30-3:00   | INPUT 1991 Systems Integration Program—Report on progress and plans.   |
| 3:00-3:30   | Summary and Close  |
| 3:45-5:00   | INPUT consultants will be available for individual discussions of SI topics.   |



### Please note changes:

### 1991 INPUT Conference Schedule—U.S.

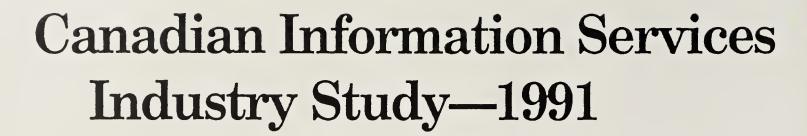
| June 13 & 14   | Federal Information Systems and Services Conference Tyson's Corner Marriott, VA   |
|----------------|---|
| July 24 & 25   | Systems Integration Conference JW Marriott, Washington, D.C.                      |
| Sept. 17 & 18  | Systems Operations Conference JW Marriott, Washington, D.C.                       |
| Oct. 6, 7, & 8 | 1991 U.S. Information Services Market Analysis Conference Fairmont, San Francisco |





# INPUT's Second Annual Canadian Information Services Industry Study—1991

- ➤1991-1996 Forecast
- ➤ Technology Trends
- ➤ Outsourcing Issues and Opportunities
- ➤ Analysis of Key Industries





### 1991-1996 Forecast

- 1991 to 1996 user expenditure forecasts and expected growth rates by delivery mode:
  - Processing Services
  - Systems Operations
  - Systems Integration
  - Professional Services
  - Network Services
  - Turnkey Systems
  - Systems Software
  - Applications Software Products

# Technology Trends and Issues

- What are information systems executives thinking about:
  - LAN and server installation and integration
  - Cooperative processing
  - Network expansion or consolidation
  - CASE tools
  - Image processing
  - Open systems platforms
  - Application portability?
- Which ones are important? Which ones are not?
- What are the factors that drive or inhibit using new technologies?

# Outsourcing Issues and Opportunities

- What are the buyers' attitudes towards outsourcing of systems operations and application management?
  - Who does what now?
  - What are the major areas of opportunity?
  - Why are users considering outsourcing?
    - · Downsizing pressures
    - · Technology assistance
    - · Focus on core business
    - · Cost savings
  - What concerns must vendors overcome?

# Analysis of Key Industries

Manufacturing
Finance (Banking and Trust)
Wholesale (Distribution)
Insurance
Federal Government

- 1991-1996 forecast by delivery mode by industry.
- What are the key driving forces in each industry?

### Methodology

- INPUT will conduct in-depth interviews with buyers and vendors.
  - These interviews will allow cross checking between what senior IS executives are thinking and planning and the experienced views of vendors active in each area.
- Other sources of information will supplement the primary research
  - INPUT reports on the U.S. and European markets
  - Trade and business publications
  - Government and industry association information
- Proven quality control and statistical methods will be employed to ensure the highest quality information.

# Study Audience

- Vendors currently active in the Canadian information services market who want solid facts to measure performance and to drive product/service business plans.
- Information technology vendors in Canada who are considering expanding into the information services market.
- Information technology vendors outside Canada who are considering expanding into the Canadian information services market.

### Study Timing

- Research/analysis will begin in October.
- Results are planned for presentation at a Subscriber Seminar in Canada. The location of the seminar is still to be determined.
- The final report will be delivered 30 days after the seminar.

### Schedule of Fees (Canadian Funds)

- Early subscriber price .......\$9,000 (before September 30, 1991)
- Regular subscriber price ......\$10,000 Invoiced and payable: 50% at time of order,

50% upon report delivery

### **Project Deliverables**

- Hardcover report
- Presentation in Canada
- 30 days of telephone support

### **About INPUT**

INPUT provides planning information, analysis, and recommendations to managers and executives in the information processing industries. Through market research, technology forecasting, and competitive analysis, INPUT supports client management and making informed decisions.

Continuous-information advisory services, proprietary research/consulting, merger/acquisition assistance, and multiclient studies are provided to users and vendors of information systems and services (software, processing services, turnkey systems, systems integration, professional services, communications, and systems/software maintenance and support).

Many of INPUT's professional staff members have more than 20 years' experience in their areas of specialisation. Most have held senior management positions in operations, marketing, or planning. This expertise enables INPUT to supply practical solutions to complex business problems.

Formed as a privately held corporation in 1974, INPUT has become a leading international research and consulting firm. Clients include more than 100 of the world's largest and most technically advanced companies.

#### INPUT Offices

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### Frankfurt

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### Tokyo

Saida Building, 4-6 Kanda Sakuma-cho, Chiyoda-ku Tokyo 101, Japan Tel. (03) 3864-0531 Fax (03) 3864-4114

Please direct your inquiries and your orders to:

### INPUT

Canadian Agent, Mr. Ross Hutchison Ross Hutchison & Associates, Inc. 174 Claxton Drive, Oakville, Ontario L6J 4N9, Canada Tel. (416) 844-4069 Fax (416) 844-4071



### **ORDER FORM**

YES! I need reliable intelligence about opportunities in the Canadian information services marketplace. I need INPUT's multiclient Canadian Information Services Industry Study—1991.

Please supply the relevant information for all three of the following sections and return this form by mail or fax (see below), or call in your order.

| SECTION ONE:<br>MY ORDER                     | Please enter my order for INPUT's multiclient Canadian Information Services Industry Study—1991.                         |                                       |  |  |
|--|--|---------------------------------------|--|--|
|  | ☐ I want to pay \$9,000 (Canadian), a savings of \$1,000 off the regular price.  I'm ordering before September 30, 1991. |                                       |  |  |
|  | ☐ I'm ordering after September 30, 199 (Canadian).   | 91, for the regular price of \$10,000 |  |  |
| SECTION TWO:                                 | ☐ Enclosed is my check for \$  | to cover the cost of my order.        |  |  |
| TERMS OF PAYMENT (CHOOSE ONE)                | ☐ Enclosed is my check for \$ that the 50% balance will be due up  | , a 50% deposit. I understand         |  |  |
|  | ☐ Please invoice my company for \$   | on purchase order                     |  |  |
| SECTION THREE:<br>AUTHORIZATION              | Please see conditions on the other side of page.   |                                       |  |  |
| Please direct your inquiries and your orders | Authorized By:   | Accepted By INPUT:                    |  |  |
| to:  | Organization   | Signature                             |  |  |
| INPUT Canadian Agent                         | Name   | Name                                  |  |  |
| Mr. Ross Hutchison                           | Title  | Title                                 |  |  |
| Ross Hutchison & Associates, Inc.            | Address  | Date                                  |  |  |
| 174 Claxton Drive                            |  |                                       |  |  |
| Oakville, Ontario                            |  |                                       |  |  |
| L6J 4N9, Canada<br>Tel. (416) 844-4069       | Telephone  |                                       |  |  |
| Fax (416) 844-4071                           | Signature Date   | Place 168 SADVW                       |  |  |
|  |  | Carl.                                 |  |  |

THE CLAR

### CONDITIONS AGREEMENT

The information provided shall be used only by the employees of and within the current corporate structure of the client and will not be disclosed to any other organization or person—including parent, subsidiary, or affiliated organizations—without written consent of INPUT. INPUT exercises its best efforts in preparation of the information provided under this Agreement and believes the information contained therein to be accurate. However, INPUT shall have no liability for any loss or expense that may result from incompleteness or inaccuracy of the information provided.



